ESTATE PLANNING

PREPARATION CHECKLIST

A little preparation can make your estate planning meeting more focused and productive. Use this checklist to gather what you know. Exact figures and formal appraisals are usually not necessary—reasonable estimates are a helpful starting point.

START HERE: Do not email account numbers, passwords, or other sensitive information. Bring only the general information needed to discuss your plan.

1. YOUR FAMILY, PRIORITIES & GOALS

☐ **Names and relationships** of your spouse or partner, children, stepchildren, and other important beneficiaries.

☐ **Any minor children**, dependents, loved ones with special needs, or family circumstances that may require extra planning.

☐ **Who you may want** to serve as guardian, financial agent, health care agent, personal representative/executor, or trustee—and at least one backup.

☐ **Your main goals**: protecting family, avoiding probate, preserving privacy, planning for incapacity, managing inheritances, supporting charity, or protecting a business.

2. YOUR FINANCIAL SNAPSHOT

☐ **Real estate:** property address, how it is titled, estimated market value, and estimated mortgage balance.

☐ **Business interests:** business name and type, ownership percentage, estimated value, and any partners or succession agreements.

☐ **Retirement assets:** estimated total value of IRAs, 401(k)s, pensions, and similar accounts; note current beneficiaries if known.

☐ **Life insurance:** estimated death benefit, policy owner, and current beneficiaries if known.

☐ **Other assets:** estimated value of bank and investment accounts, valuable personal property, and property owned in another state.

☐ **Debts:** estimated balances for mortgages, loans, credit cards, personal guarantees, or other significant obligations.

3. HELPFUL DOCUMENTS & QUESTIONS

☐ **Existing wills**, trusts, powers of attorney, health care directives, deeds, or business planning documents.

☐ **Recent account** or policy summaries, beneficiary designations, and any prenuptial, postnuptial, divorce, or support agreements that may affect the plan.

☐ **A written list** of questions, concerns, and “what if” scenarios you want the attorney to address.

WHY THIS INFORMATION MATTERS Ownership, asset values, debt, beneficiary designations, family needs, and business interests can affect which documents are appropriate and whether probate, tax, creditor, or inheritance-management concerns should be addressed.

Honoring legacies and easing burdens through Estate Planning.

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