The TICKER TAPE®

Quick Start Guide to Estate Planning

Follow this checklist to help make sure your estate plan wishes are known and necessary documents are in place. Get more tips on estate planning: https://tickertape.tdameritrade.com/personal-finance/estate-planning

Up-to-Date Will: Directs how to distribute property and other bequests, and if you have children, sets instructions for their well-being.					
	Name executor Name guardian for children Name successor (business owners)			Name estate beneficiaries Direct fund disbursement to children Added final arrangements or requests	
Health Care & Financial Directives: Spell out health care wishes and allow others to make decisions on your behalf. Holding your property in a living trust permits survivors to forego probate court, saving time and money.					
	Name financial power of attorney Living will	′		Name health care power of attorney Living trust	
	Beneficiary Forms: Name a beneficiary on all accounts to grant designees automatic access to assets and avoid probate.				
	Bank accounts Brokerage & custodial accounts Name transfer-on-death beneficiary on all taxable accounts			Retirement accounts Stocks, bonds, mutual funds, & other investments	
Est	Estate Taxes: File if your estate exceeds \$12.6 million in 2022.				
	ife Insurance: May be important if others rely on your income for basic living expenses, or your estate will owe any debts after your death.				
acc	Document Storage: Your executor, attorney, and designated decision makers may need to access documents and account information, so you might wish to store these in a safety deposit box that is accessible by your designees.				
	Insurance policies Loans: Mortgage & auto		Sto	nk & investment accounts ock certificates edit cards lities & other bills	



tickertape.tdameritrade.com

This information is provided for educational purposes only. TD Ameritrade does not provide legal or tax advice and this information is not intended to be relied upon as such. Please consult with a legal or tax-planning professional with regard to your personal circumstances.

TD Ameritrade, Inc., member FINRA/SIPC, a subsidiary of The Charles Schwab Corporation. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. © 2022 Charles Schwab & Co. Inc. All rights reserved.