

Estate Planning Checklist

For more tips on estate planning,

read [Writing a Will: Several Dos and Don'ts and why you need one](#)

- Up-to-Date Will: Directs how to distribute property, 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
- Healthcare & Financial Directives: Spell out healthcare 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 Healthcare 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
 - Retirement Accounts
 - Stocks, Bonds, Mutual Funds & Other Investments
 - Name Transfer-On-Death Beneficiary on All Taxable Accounts
- Estate Taxes: File if your estate exceeds \$11.1 million in 2018. For more information, read [Final Answer: Three Estate Planning Tax Considerations](#)
- Life Insurance: May be important if others rely on your income for basic living expenses, or if your estate will owe any debts after your death.
- Document Storage: Your executor, attorney, and designated decision makers may need to access documents and account information, so you might wish to store in a safety deposit box, accessible by your designees.
 - Wills
 - Insurance Policies
 - Loans: Mortgage & Auto
 - Tax Filings
 - Bank & Investment Accounts
 - Investment Certificates
 - Credit Cards
 - Utilities & Other Bills

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