

Estate Planning Checklist

Setting your priorities

- Have you specified how your assets are to be distributed?
- Will there be a source of income for your family when you die?
- Will there be a source of income if you are disabled?
- Do you know what your income will be at retirement?
- Do you know what the tax exposure is on your estate?
- Do you know how any taxes will be paid?

Taking an inventory of your estate

- Are all your important papers together?
- Does your executor know where they are?
- Do you have a will?
- Do you need/have a trust agreement?
- Do you have a buy-sell agreement for your business?
- Do you have a current net worth statement?

Your executor

- Have you chosen your executor?
- Does this person know of your choice?
- Have you explained your expectations?

Your family

- Have you made funeral plans?
- Have you discussed them with your family?
- Have you had a family meeting to talk about your estate plan?
- Has your family met your professional advisors?
- Does your family know who you've appointed as your executor?
- Is your life insurance beneficiary information up to date?