Easy Estate Planning Checklist

RetireGuide®

An all-in-one document of everything you need to consider and account for when preparing for your future.

- [ ] Plan your documents
  - [ ] Last will and testament
  - [ ] Trusts
  - [ ] Living will
  - [ ] Power of attorney
- [ ] Evaluate your assets
  - [ ] Homes or property
  - [ ] Cars
  - [ ] Valuables
  - [ ] Sentimental items
  - [ ] Bank accounts
  - [ ] Brokerage accounts
  - [ ] Retirement accounts
  - [ ] Life insurance policies
  - [ ] Stocks or bonds
- [ ] Consider any outstanding debts
- [ ] Pick your beneficiaries
- [ ] Choose your executor and trustee
- [ ] Make note of important login and password information
  - [ ] Bank account
  - [ ] Retirement networks
  - [ ] Life insurance policy accounts
- [ ] Review your documents yearly to note for changes (such as a beneficiary passing away)
  - [ ] Births
  - [ ] Deaths
  - [ ] Marriages
  - [ ] Divorces

- [ ] Additional Notes
  - [ ]
  - [ ]
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