

PLANNING TEMPLATE · PLANNING

Estate Planning Checklist

Comprehensive guide to essential estate planning documents and decision points.

- Document completion checklist
- Beneficiary review section
- Important contacts list
- Digital assets inventory
- Healthcare directive guidance
- Review schedule reminders

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How to use

- 1. Review checklist of essential documents
- 2. Check off completed items
- 3. Note items requiring professional help
- 4. Update beneficiary designations
- 5. Schedule regular reviews

Document checklist

Document	Done	Where it is kept	Last updated
Will			
Revocable living trust (if used)			
Durable financial power of attorney			
Healthcare power of attorney			
Living will / advance directive			
HIPAA authorization			
Guardianship nominations for minor children			
Letter of instruction			

Beneficiary review

Account (401k, IRA, life policy, TOD/POD)	Primary	Contingent	Reviewed on

Important contacts

Role	Name	Phone / email
Executor		
Trustee		
Attorney		
Financial planner		
Accountant		
Insurance agent		