

Estate Planning: A Simple Checklist



Completing your estate planning can feel daunting, but it doesn't have to. Below are 8 critical categories to include when you're planning. Review each of these once a year to make sure they're up to date.

Will

A will allows you to:

- Name guardians for children and pets (if you have any)
- Distribute personal property/assets (to family, charities, etc.)
- Name an executor (who is going to carry out the will)

Beneficiary Designations

Name a beneficiary for non-probate assets (such as retirement pensions, life insurance policies, 401k and IRA accounts)

Healthcare Representative (Medical Power of Attorney)

Name a representative that will be able to make important medical decisions for you in the case that you are unable to do so.

(Financial) Power of Attorney

Choose a financial agent/power of attorney to make important financial decisions for you in the case you are unable to do so.

Identification Documents

It's important to know where the following documents are and can be accessed by people chosen to carry out your plan:

- Birth certificate
- Social security card
- Marriage or divorce certificates
- Any other identifying documents

Titles/Property Deeds

Get together any titles for cars, property or real estate deeds into one central location.

Digital Assets

It's often overlooked, but it's critical in a digital age to have your digital assets accounted for and accessible. These may include:

- Social media accounts
- Emails
- Digital files (photos, files, etc.)
- Online banking information

Funeral Plans/Instructions

Help your loved ones by creating a plan that includes important details like type of service and location.

For additional help, please reach out to our team at 360 Financial. We're here to help navigate critical financial events and ensure you leave a legacy you're proud of.

Securities offered through LPL Financial. Member FINRA/SIPC. Investment advice offered through 360 Financial, a registered investment advisor and separate entity from LPL Financial