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Estate Planning Checklist

- Do a Physical Items Inventory
  - Home Value
  - Vehicles
  - Guns
  - Jewelry
  - Collectibles
  - Anything over $500 in value
- Do a Non-Physical Items Inventory & Review Beneficiaries
  - Investment Accounts - Transfer on Death designation
    - Make sure it is consistent with Estate documents
  - Any company retirement plans
  - IRA accounts
  - Bank Accounts - Transfer on Death designation
    - Make sure it is consistent with Estate documents
  - All Insurance Policies (Long-term Care, Life, Auto, etc.)
  - List of all accounts (utilities, etc.) & any online passwords
- Assemble a Debt List
  - Mortgages & Home Equity Loans or Lines of Credit
  - All open credit cards (with a balance or not)
  - Auto Loans
  - Get a free credit report: www.annualcreditreport.com
- Create a Will or a Trust with an Estate Attorney
- Choose an Estate Administrator & Provide copy of Estate List