Estate Planning Checklist

Things to Bring to Your Estate Planning Conference

- ☐ Any old/current documents such as Wills, Trusts, Marital Property Agreements, financial or health care powers of attorney, etc.
- ☐ Copies of deeds to home and other real estate that reflect how title is held; real estate tax bills; approximate value
- ☐ Names, addresses and telephone numbers of named agents, heirs or beneficiaries
- ☐ Long term care policies
- ☐ Income information
- ☐ Bank/investment account information – approximate value, how titled, beneficiary or payable on death information
- ☐ Retirement Account information—type of account (IRA, 401K, pension), approximate value, beneficiary information
- ☐ Annuity information – approximate value, beneficiary information, accumulation or payout phase
- ☐ Life insurance – list policies, cash value, death benefit value and beneficiary information
- ☐ List of debt, liabilities