

# Estate Plan Checklist

Use this checklist as a guideline when creating your estate plan, or to update your estate plan.

## *New Estate Plan*

- Create a will/trust and name beneficiaries
- Make a health care directive
- Select a financial power of attorney
- Purchase life insurance
- Funeral expenses/final arrangements
- Include property/home
- Include children, grandchildren, and other family in your plan
- Include a charitable gift to your church or charity

## *Updated Estate Plan*

- Have you accounted for marriage, divorce, births, and deaths?
- Purchase of a new home
- New business venture
- Substantial increase or decrease in wealth since the last update
- Have you moved to another state?
- Property under joint names
- Changes in beneficiary designations
- Is insurance still needed?
- Should ownership of policies be changed to save on estate taxes?