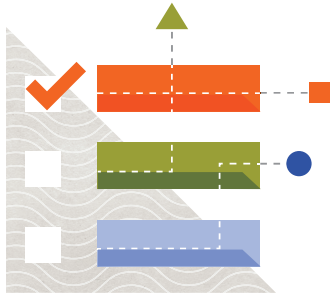


WEALTH PLANNING

An Estate Plan Checklist: Essential documents, accounts, and types of information to organize



Your inclusive wealth plan incorporates all facets of your wealth management needs. Our dedicated planning team works collaboratively with you to select and implement strategies that address your unique situation today and prepare you for life's transitions.

Wondering where to start?

A complete plan includes a will, trusts, and key legal documents—such as powers of attorney for financial and health care matters—and requires advance thought on what you would like to have happen if life takes a surprising turn. Being prepared for unexpected events—and even just the natural course of life— can make a big difference to your family and heirs.

This checklist is designed to help you plan ahead and make important arrangements in advance. In addition to having these items prepared, you should also have documentation for each compiled in an accessible location that you have shared with a trusted friend, family member, or advisor.

Essential documents

- Health care power of attorney
- Health care proxy, advance directive
- Will
- Birth certificate and Social Security card
- Marriage/domestic partnership/divorce documents

Accounts

- Checking/savings accounts
- Investment accounts
- Life insurance
- Pension/retirement benefits
- Outstanding loans, credit cards

Continued

Information to organize

- Location of safe deposit box and keys
- Pre-planned funeral arrangements, cremation plans, cemetery, burial plot
- Contact information for closest friends and family
- Beneficiaries of your IRA, annuity, life insurance, etc.
- Contact information for your attorney, executor, trustee, accountant/CPA, CFP, insurance agent(s)
- Landlords, tenants, employers, employees
- Utility companies: gas, electric, water, phone, internet, TV, etc.
- Real estate deeds, mortgages, vehicle titles
- Digital Assets: Computer and mobile devices, electronic storage devices, online account log-ins, passwords, security questions, associated mobile numbers and recovery email addresses, email, social media, cloud services, banking, bill pay, etc.

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