



4 STEPS TO GETTING YOUR AFFAIRS IN ORDER

Estate planning is important for all individuals and their families. It is never too early! This checklist outlines the steps you should take to begin the process of getting your affairs in order. Be proactive on the front end to save your loved ones time, stress and money on the backend.

STEP 1 – TAKE INVENTORY

Everything you own is considered your estate, even if it's not much. Auditing your possessions is Step 1 in handling your affairs.

- List the value of your home and other real estate along with cars, jewelry, artwork, and other assets
- Gather recent statements from your bank, brokerage, and retirement accounts
- Include the location and contents of any safety deposit boxes or safes
- Make a list of all insurance policies, their cash values, beneficiaries and death benefits
- List all liabilities, including mortgages, lines of credit and other debt

STEP 2 – MAKE THE DECISIONS

Prepare to meet with an Estate Planning Attorney by answering these important questions about how to settle your affairs:

- Who will inherit your assets, and in what proportions?
- Who will care for your minor children?
- Who will manage your financial affairs if you become incapacitated?
- Who will be responsible for distributing your assets?

STEP 3 – ACTIVATE YOUR PLAN

Meet with an Estate Planning Attorney to have your plan drafted.

- Will
- Medical Powers of Attorney
- Financial Powers of Attorney
- Trust Documents, if applicable

STEP 4 – UPDATE REGULARLY

Keep in touch with your Estate Planning Attorney to...

- Review and update your documents and accounts as your situation changes or as current laws change
- Keep your beneficiary designations up to date so that your assets will be distributed according to your wishes