

# Fleurish Estate Planning Checklist



What do I want to leave behind?

## Goals:

- Avoid court intervention and unnecessary legal fees.
- Make the transfer of your assets as easy on your loved ones as possible.
- Control how and when your assets are transferred.

### Estate Planning Documents

- Do you have a valid Last Will & Testament?
- Do you have a Revocable Living Trust?
- If you have a Trust, is your trust fully funded?
- Do you have a Durable Power of Attorney?
- Do you have an Advance Health Care Directive?
- If you are a business owner, do you have a succession plan?
- If you are a veteran, locate your DD-214 form.

### Review & Update

- Do you have a plan for your children's inheritance?
- Have you recently reviewed your life insurance policies?
- Have you updated your beneficiary designations?
- Have you reviewed updates to the estate tax?
- Have you made your funeral arrangements/expenses?
- Have you verified all real estate is titled correctly?
- Have you made a secure list of usernames and passwords?
- Have you had your documents reviewed by an estate planning attorney in the last three years?

### Organize

- Are all of your estate planning and financial documents organized?
- Do your loved ones know where to find your important documents?
- Have you documented any money that is currently owed to you?
- Update your personal property memorandum (if you have one).
- Create a list of any debts that you owe.