

# ESTATE PLANNING CHECKLIST

## ☐ GATHER PERSONAL INFORMATION

- ☐ List of dependents and their information (spouse, children, parents, etc.)
- ☐ Full legal names & birthdates of you and your beneficiaries.
- ☐ Marital status with legal documents.
- ☐ Financial statements (bank accounts, investments, retirement funds, etc.)
- ☐ Real estate & property details (deeds, mortgages, etc.)

## ☐ CHOOSE DECISION MAKERS

- ☐ Executor (who will manage your estate after passing.)
- ☐ Financial Power of Attorney (who will handle finances if you're incapacitated.)
- ☐ Medical Power of Attorney/Healthcare Proxy (who will handle medical decisions if you're incapacitated.)
- ☐ Guardians for dependent children and/or pets.
- ☐ Trusted advisor to assist Executor (if needed)

## ☐ PLAN FOR ASSET DISTRIBUTION

- ☐ Physical assets (property, vehicles, jewelry, etc.)
- ☐ Financial assets (investments, stocks, etc.)
- ☐ Review beneficiaries on retirement accounts & life insurance.
- ☐ Decide who gets what of your assets.
- ☐ Designate Transfer-on-Death (TOD) accounts.
- ☐ Consider charitable donations or special bequests.

## ☐ OWN A BUSINESS?

- ☐ Gather documentation on the business (financial, insurance policies, deeds, etc.)
- ☐ Log assets of the business (equipment, stock, etc.)
- ☐ Outline a business structure.
- ☐ Outline a business succession plan.
- ☐ Decide on transfer strategies (joint ownership, trusts, etc..)

## ☐ MINIMIZE TAXES & PROBATE AVOIDANCE

- ☐ Review estate tax implications.
- ☐ Consider trusts to avoid probate and reduce tax burden.
- ☐ Set up gifting strategies (to transfer wealth tax-efficiently.)

## ☐ SECURE & UPDATE DOCUMENTS

- ☐ Store original documents in a safe, accessible place.
- ☐ Provide copies to trusted decision makers & attorneys.
- ☐ Review & update every 3–5 years or after major life events (marriage, divorce, birth, death, etc.)

## ☐ CREATE ESSENTIAL LEGAL DOCUMENTS

- ☐ Will (outlines asset distribution & guardians for minors.)
- ☐ Trusts (to manage assets & avoid probate.)
- ☐ End-of-Life Instructions (method, type of service, etc.)
- ☐ Living Will/Advance Directive (medical treatment preferences.)
- ☐ Power of Attorney Documents (financial & healthcare.)

### PREFER A MORE IN-DEPTH FILLABLE QUESTIONNAIRE?

Download our comprehensive Estate Planning Questionnaire to get started on a more detailed plan tailored to your unique needs. Visit [www.frasorireland.com](http://www.frasorireland.com) to find our full questionnaire that you can fill out, then bring to your first appointment with us!

### READY TO SECURE YOUR FUTURE?

Contact Frasor Ireland, LLP today to schedule a consultation and ensure your estate plan is comprehensive and up-to-date!



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