

Poised to Prosper

Estate Planning Basics Checklist

1. BEFORE MEETING WITH AN ATTORNEY

- Gather your basic information: _____
- Gather contact information: _____
- Create a list of your assets and debts, if any: _____

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- Create a list of your insurance policies: _____
 - Gather existing estate planning documents, including trusts: _____

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- Consider the disposition of your assets: _____

2. ESTATE PLANNING DOCUMENTS

- Statutory Durable Power of Attorney: _____
- Medical Power of Attorney: _____
- HIPAA Authorization: _____
- Declaration of Guardian for yourself: _____
- Declaration of Guardian for minor children: _____
- Last Will and Testament: _____

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- Trusts: _____

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- Other documents: _____

3. THE DRAFTING PROCESS

- Ask questions: _____
- Review your documents before signing: _____
- Consider meeting with a trust department: _____

4. AFTERWARDS

- Safeguard your documents, including your original will: _____
- Review your plan every 3-5 years or after major life events: _____



