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SMITH WILL & TRUST

Estate Planning Checklist

Your step-by-step guide to getting organized before meeting with an estate planning attorney.

☐ Personal & Family Information

- Full legal names, birth dates, and Social Security numbers for yourself, spouse/partner, and children
- Copies of marriage, divorce, and adoption documents
- Names and contact information for key family members and decision-makers

☐ Financial Accounts

- Bank accounts (checking, savings, CDs)
- Investment accounts (brokerage, retirement, pensions)
- Life insurance policies and annuities
- Outstanding loans, credit cards, and other liabilities

☐ Real Estate & Property

- Deeds for your home(s), vacation property, and land
- Mortgage statements and property tax records
- Vehicle titles (cars, boats, RVs)
- List of valuable personal property (jewelry, art, collectibles)

☐ Business & Digital Assets

- Ownership documents for any business interests
- Operating agreements, buy-sell agreements
- Login credentials for important digital accounts (or secure location of password manager)

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☐ Healthcare & End-of-Life Wishes

- Preferred guardians for minor children
- Health care power of attorney / living will preferences
- Organ donation wishes
- Funeral or memorial instructions (if known)

☐ People You Trust

- Executor of your will
- Trustee (if creating a trust)
- Guardians for minor children
- Agents for financial and healthcare powers of attorney

☐ Documents to Bring to Your Attorney

- Existing will or trust (if any)
- Existing powers of attorney or living will
- Copies of recent tax returns
- Any prenuptial or postnuptial agreements