

# Estate Planning Checklist

Be Prepared for Life's Uncertainties

## Legal & Estate Documents

- **Select a Trusted Estate Attorney**
  - Interview to ensure the right fit.
  - Assess competency, experience, and credentials.
- **Last Will & Testament**
  - Appoint an Executor and backup Executors to oversee probate.
  - Name an Executor and specify asset distribution.
- **Revocable Living Trusts (if applicable)**
  - Name a Trustee and Contingent Trustees to manage the Trust.
  - Consult a Financial Advisor to transfer property and assets into the Trust.
  - Appoint a successor Trustee to manage the Trust once you pass.
- **Appoint a Power of Attorney (POA)**
  - Financial POA**  
Authorize someone to make financial decisions.
  - Healthcare POA**  
Assign a healthcare agent to make medical decisions.
- **Establish a Healthcare Directive**
  - Document and discuss medical preferences.
- **HIPAA Authorization**
  - Permit access to your medical records.

## Final Arrangements & Ongoing Review

- **Funeral & Burial Instructions**
  - Communicate wishes with loved ones.
- **Regular Updates**
  - Review and adjust after significant life events.

## Managing Finances & Assets

- **Key Documents**
  - Gather birth certificate, Social Security card, marriage/divorce records, and military papers.
- **Beneficiary Designations**
  - Ensure life insurance, retirement accounts, and pensions are up to date.
- **Insurance Information**
  - Organize health, life, home, renters, and auto policies.
- **Financial Accounts**
  - List banks, loans, credit obligations, and advisors.
- **Titles and Deeds**
  - Review titles and deeds for your home, vehicles, and other property.
  - List financial accounts, loans, and credit obligations.
  - Securely record advisors, account numbers, and passwords.
  - Ensure trust assets are retitled appropriately.
  - If you own a business, create a succession plan.

## Family & Legacy Considerations

- **Guardianship Designation**
  - Name guardians for minor children.
- **Letter of Intent**
  - Guide heirs regarding personal wishes or specific asset distribution.
- **Personal Memorandum**
  - Document sentimental items and heirlooms.
- **Digital Assets Plan**
  - Use a Password Manager to keep track of your accounts and share the password with Executor.
  - Create a list of all financial accounts, social media, online accounts, and digital assets.



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