



ESTATE PLANNING DOCUMENT CHECKLIST™

Find what you have. Identify what's missing. Take the next step with confidence.

WHY THIS MATTERS

Knowing what you have and where to find it can make it easier to understand your plan, prepare questions, and help the people you love know where important information is kept.

USE THIS CHECKLIST TO:

- Locate important documents and account information
- Identify items you may need to find or review
- Write down questions for your next conversation

1. CORE ESTATE-PLANNING DOCUMENTS

DOCUMENT / INFORMATION	HAVE IT	CAN FIND IT	NEEDS ATTENTION	NOTES / LOCATION
Revocable Living Trust Locate the current signed trust and any amendments or restatements.	☐	☐	☐	
Last Will & Testament / Pour-Over Will Locate the most current signed version.	☐	☐	☐	
Financial Power of Attorney Identifies who may handle financial matters when authorized to act.	☐	☐	☐	
Healthcare Power of Attorney Identifies who may make healthcare decisions when authorized to act.	☐	☐	☐	
Living Will / Healthcare Directive Records healthcare and end-of-life instructions or wishes.	☐	☐	☐	

2. PROPERTY & ASSET INFORMATION

DOCUMENT / INFORMATION	HAVE IT	CAN FIND IT	NEEDS ATTENTION	NOTES / LOCATION
Deeds & Property Records Homes, land, investment property, and other real estate.	☐	☐	☐	
Vehicle Titles Cars, RVs, boats, and other titled vehicles.	☐	☐	☐	
Business Ownership Documents Ownership, organizational, or succession records if you own a business.	☐	☐	☐	

You do not need to have everything figured out before you begin. If you are unsure about an item, mark **Needs Attention**. The goal is to identify what you know, what you can locate, and what you want to ask about.



3. ACCOUNTS & BENEFICIARIES

DOCUMENT / INFORMATION	HAVE IT	CAN FIND IT	NEEDS ATTENTION	NOTES / LOCATION
Bank & Credit Union Accounts Checking, savings, CDs, money market, and similar accounts.	☐	☐	☐	
Investment & Brokerage Accounts Stocks, mutual funds, brokerage, and other investment accounts.	☐	☐	☐	
Retirement Accounts 401(k), IRA, pension, and other retirement accounts.	☐	☐	☐	
Life Insurance / Annuities Policies, contracts, statements, and beneficiary information.	☐	☐	☐	
Beneficiary Designations Current beneficiary information for applicable accounts and policies.	☐	☐	☐	

4. OTHER IMPORTANT INFORMATION

DOCUMENT / INFORMATION	HAVE IT	CAN FIND IT	NEEDS ATTENTION	NOTES / LOCATION
Digital Information Know where instructions for important digital accounts are securely maintained.	☐	☐	☐	
Safe Deposit Box Location, access information, and authorized persons.	☐	☐	☐	
Important Contacts Estate-planning, financial, insurance, tax, and other key professionals.	☐	☐	☐	
Final Wishes / Family Instructions Personal, funeral, memorial, family, or practical instructions.	☐	☐	☐	
Other Important Documents Anything else your family or decision-makers may need to locate.	☐	☐	☐	

WHAT DID YOU DISCOVER?

Documents or information I need to locate, review, update, or ask about:

QUESTIONS ABOUT WHAT YOU DISCOVERED?

Schedule a complimentary **Family Legacy Review™**. Bring this checklist with you. Your questions give us a practical place to start.



CLAIM MY LEGACY™
602-550-7365
ClaimMyLegacy.com

**Scan to schedule your complimentary
Family Legacy Review™**

EDUCATIONAL NOTICE

This checklist is provided for educational and organizational purposes and is not legal, tax, investment, financial, or insurance advice. Individual circumstances vary, and appropriate professional guidance may be needed.