21 POINT

# ESTATE PLANNING CHECKLIST

- WILL
- TRUST
- Financial Power of Attorney
- HIPPA Authorizations
- Children's inheritance
- Beneficiary forms
- Health Care POA
- Review Life Insurance
- Review Estate Tax
- Plan for funeral expenses
- Make other final arrangements
- Exit strategy for business owners
- Organize important docs.
- Verify Property Titles
- Tell loved ones location of docs.
- Verify Trust is fully funded
- Verify no updates to the law
- List any money owed to you
- If Veteran - locate DD 214
- Update Personal Property Memo
- List any debts you owe

NOTES

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