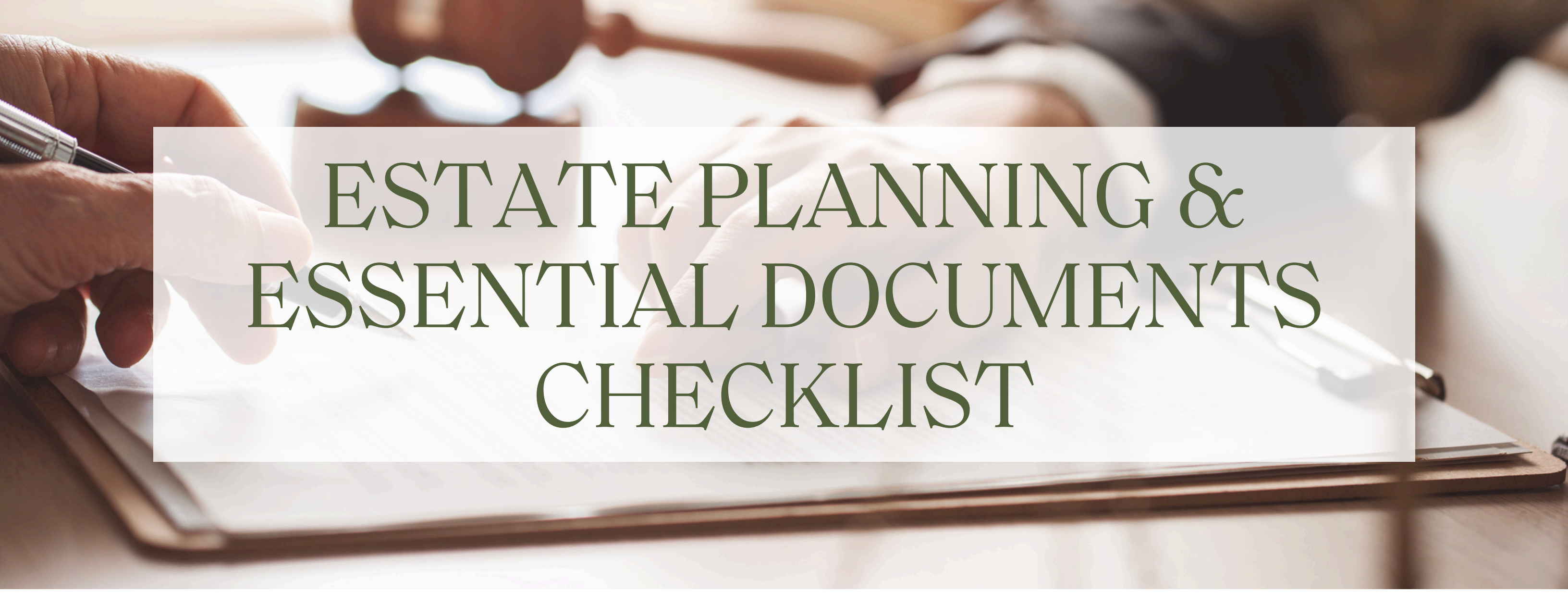

ESTATE PLANNING & ESSENTIAL DOCUMENTS CHECKLIST

As you or a loved one age, organizing key information—future wishes, finances, healthcare decisions, and estate planning—brings peace of mind. Use this checklist to get started:

☐ LAST WILL & TESTAMENT

Outlines how your assets should be distributed and who will manage your estate. Choose someone you trust to carry it out. Even a simple will provides clarity for loved ones.

☐ DURABLE POWER OF ATTORNEY

Lets a trusted person manage your financial and legal matters—paying bills, managing accounts, handling paperwork—if you're unable to.

☐ HEALTHCARE PROXY OR MEDICAL POWER OF ATTORNEY

Names someone to make healthcare decisions for you if you can't communicate. Discuss your preferences ahead of time.

☐ ADVANCE DIRECTIVE OR LIVING WILL

Documents your preferences for medical care and end-of-life decisions, helping loved ones feel confident during hard moments.

☐ FINANCIAL ACCOUNT INFORMATION

List key accounts: banking, retirement, insurance, mortgages, and investments. Make sure trusted people know where to find them.

☐ BENEFICIARY DESIGNATIONS

Review beneficiary designations regularly on retirement and insurance accounts. Since they often override your will, keeping them current ensures your assets go where you intend.

☐ IMPORTANT PERSONAL DOCUMENTS

Keep birth and marriage certificates, Social Security info, passports, and property deeds organized together in one secure, accessible place.

☐ DIGITAL INFORMATION AND PASSWORDS

Store passwords and online account details securely, since so many records are now digital.

☐ EMERGENCY CONTACT & CARE LIST

Keep contacts, physicians, medications, allergies, insurance, and pharmacy info in an easy-to-reach place.

☐ KEEP DOCUMENTS UPDATED

Estate planning isn't one-and-done. Revisit after major changes like marriage, a move, or health shifts, and make sure trusted people know where everything is.

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