



Your Employee and Family Assistance Program is a support service that can help you take the first step toward change.

Estate Planning Checklist

Yes

No

Inventory of physical Items (jewelry, collectibles, cars etc.)

Inventory of non-physical items (401K plans, stocks, insurance policies etc.)

Up-to-date and signed will

Designated executor or power of attorney

A backup executor or power of attorney

Designated guardianship of minor children

Beneficiary designations up to date

All dependants provided for

Trusts established

Living will or medical directive

Update life insurance and annuities

Inform executor/spouse/children where to find necessary documents and financial information (will, bank accounts, tax records, etc.)

Estimate cost of probating will

Business succession plan in place

Funeral instructions and wishes

Prepay funeral

Wishes regarding organ donation

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