



Estate Planning Document Checklist

Every document you need — with status tracking

Core Documents

DOCUMENT	HAVE IT	NEED IT	UPDATED	LOCATION
Last Will and Testament Specifies asset distribution, guardian for minors	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Revocable Living Trust Avoids probate, provides privacy	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Financial Power of Attorney Authorizes someone to manage finances if incapacitated	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Healthcare Power of Attorney Authorizes medical decisions if you cannot make them	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Living Will / Advance Directive Specifies end-of-life medical preferences	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
HIPAA Authorization Allows access to your medical records	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Beneficiary Designations

DOCUMENT	HAVE IT	NEED IT	UPDATED	LOCATION
401(k) / 403(b) beneficiary forms Override your will — check annually	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
IRA / Roth IRA beneficiary forms Review after any life change	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Life insurance beneficiary forms Both primary and contingent	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Bank accounts (POD designation) Payable-on-death avoids probate	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Brokerage accounts (TOD designation) Transfer-on-death avoids probate	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
HSA beneficiary form Tax-free to spouse, taxable to others	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Supporting Documents

DOCUMENT	HAVE IT	NEED IT	UPDATED	LOCATION
Asset inventory with locations List every account, property, policy	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Digital asset inventory Passwords, crypto keys, online accounts	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Letter of instruction Personal wishes, funeral preferences	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Guardian designation for minors Named in will with backup	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Pet trust or care instructions Who cares for pets, with what funds	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
Organ donation documentation Registered + family aware	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____