



DOING  
THE MOST  
GOOD®



## ESTATE PLANNING ESSENTIALS

### General Information Needed

- Value of your estate
- Determine how your assets will be distributed
- Name of executor
- Name of a Successor Trustee of your Revocable Trust
- Appoint Guardians (if applicable)
- Review Beneficiary designations to insure they are up to date
- Review ownership of property
- Family contact information
- Investment account records, retirement, annuities, trusts, stocks, bonds/CD's, etc.
  - ◆ Real estate records
  - ◆ Pet care directives
  - ◆ Special needs
  - ◆ Charitable gifts

### Your Important Documents

- Will document
- Revocable Trust Agreements
- Life Insurance
- Birth Certificate
- Living Will
- Tax returns
- Military records
- Marriage Certificate
- Passport
- Burial plans
- School Transcripts
- Adoption Documents
- Medical Power of Attorney
- Durable Power of Attorney



## EMERGENCY CONTACT INFORMATION

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Name: \_\_\_\_\_ Relation: \_\_\_\_\_