

## Estate Planning Checklist

In order to best assist you in preparing your estate plan, you and your attorney will need a complete picture of your assets and how they are presently titled. Check on joint ownership and beneficiaries. You can use the following list as a guideline:

*Bank Accounts, Certificates of Deposit*

*Stocks, Bonds, Mutual Funds*

*Annuities*

*Life Insurance Policies – personal and through employment*

*Employee benefits, pension, death benefits*

*Titled vehicles, boats, motors*

*Real Estate*

*Personal Property including jewelry, artwork, antiques, coin collections*

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Personal debt/ mortgage indebtedness

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*Do you have up-to-date:*

Financial Power of Attorney

Living Will/Healthcare Power of Attorney