Planning Checklist

Work through these at your own pace. Tick each item and note the date you finished it.

My planning steps

☐	Fill in my personal information and key contacts	DONE ON
☐	List my accounts, property and debts	DONE ON
☐	Check the beneficiary on every insurance policy and account	DONE ON
☐	Choose an executor and a backup, and ask them	DONE ON
☐	Choose a guardian for my minor children or dependents	DONE ON
☐	Make or update my will, and sign it the way my state requires	DONE ON
☐	Sign a financial power of attorney	DONE ON
☐	Sign a health care proxy or advance directive	DONE ON
☐	Write down my final wishes	DONE ON
☐	Fill in the document locator	DONE ON
☐	Tell my executor where this kit and my documents are kept	DONE ON

Keeping it current

DATE I LAST REVIEWED MY PLAN

NEXT REVIEW (ONE YEAR LATER)

CHANGES TO MAKE OR QUESTIONS FOR MY ATTORNEY

For your personal records. This kit is not a will and is not legal advice. Laws vary by state; talk to a licensed attorney about your situation.