

Estate Planning Starter Checklist

For general information only. Not legal advice.

- List key assets (bank accounts, retirement, real estate, business interests).
- Confirm beneficiary designations for accounts and policies.
- Choose guardians for minor children (if applicable).
- Select trusted agents for financial and medical decisions.
- Consider whether a trust aligns with your privacy and control goals.
- Plan for updates after major life events (marriage, birth, relocation).