Your Personal Estate Planning Checklist

Create a clear, simple guide for your loved ones — so they aren't left guessing.

This is helpful not just as part of your estate plan, but as an emergency resource if an unexpected health or life event occurs. Remember that this should be secured in a safe location, preferably not on your computer for safety reasons. Consider a locked safe in your home, a safe deposit box, etc. You may also want to give a copy to a trusted friend or relative.

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1. Personal Information

- ☐ Full legal name
- ☐ Date of birth
- ☐ Social Security number
- ☐ Address
- ☐ Contact information
- ☐ Marital status & spouse's name

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2. List of Assets

Include what you own and where to find it. Include any contact persons and applicable contact info (account managers, realtor, business partners, etc).

- ☐ Bank accounts (checking, savings, credit unions)
- ☐ Retirement accounts (401k, IRA, pensions)
- ☐ Investment/brokerage accounts
- ☐ Life insurance policies
- ☐ Real estate (homes, land, rental property)
- ☐ Vehicles (cars, boats, motorcycles)
- ☐ Business ownership or partnerships
- ☐ Valuables (jewelry, art, collectibles)

- ☐ Safe deposit box location & key info

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3. List of Debts & Bills

What needs to be paid — and who to contact.

- ☐ Mortgage(s) and loans (auto, student, personal)
- ☐ Credit card accounts
- ☐ Medical bills
- ☐ Utilities (electric, gas, water, phone, internet)
- ☐ Subscription accounts (streaming, software, etc.)
- ☐ Other recurring bills (child support, alimony, memberships)

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4. Digital & Online Accounts

Don't forget about access to important information you may have stored in any of the following:

- ☐ Email accounts
- ☐ Social media accounts
- ☐ Online banking logins
- ☐ Password manager access (or a written list of passwords)
- ☐ Cloud storage or digital files
- ☐ Domain names or websites (that you have ownership of)

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5. Legal & Planning Documents

Let your executor know where these are stored. It's a great idea to keep them with this list all in one place, or give copies to those who may need them.

- ☐ Will and/or trust
- ☐ Power of attorney (financial & medical)
- ☐ Healthcare directive / Living will

- ☐ Funeral instructions or wishes
- ☐ Marriage/divorce documents
- ☐ Adoption or guardianship papers
- ☐ Property deeds and titles

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6. Instructions for Executor/PR

A personal note goes a long way.

- ☐ Names of key advisors (lawyer, accountant, pastor)
- ☐ Preferred funeral or memorial wishes
- ☐ Letters to family members or instructions
- ☐ Tips for settling your affairs smoothly

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7. Faith & Legacy

How do you want your values reflected in your plan?

- ☐ Charities or ministries you want to support
- ☐ Church or missions giving
- ☐ Personal testimony, life story, or spiritual legacy
- ☐ Special messages to church family or to ministries your chose to support through an estate gift
- ☐ Bible verses or quotes to include in your service or legacy letter