Estate Planning Document Checklist

Free printable planning worksheet • NOT a legal document or software-generated form

Potential documents / planning areas

- ■ Last will and testament: reviewed / needed / not applicable
- ■ Revocable living trust: reviewed / needed / not applicable
- ■ Financial power of attorney: reviewed / needed / not applicable
- ■ Health-care agent / advance directive: reviewed / needed / not applicable
- ■ HIPAA information release planning: reviewed / needed / not applicable

Roles and provisions

- ■ Executor and alternate identified
- ■ Trustees / successor trustees identified
- ■ Guardianship questions reviewed, if relevant
- ■ Beneficiaries and distribution choices reviewed

Prior records to request

- ■ Earlier documents and amendments
- ■ Trust funding / titles / beneficiary designations
- ■ Client-specific state-law and signing review

Office follow-up

Missing information or next steps

Responsible person / follow-up date

Use for discussion and internal intake only. This worksheet does not create, replace or execute a will, trust, power of attorney or advance directive. Verify all content and signing requirements under applicable state law.