

ESTATE PLANNING CHECKLIST

As a service to our clients and friends this checklist of essential estate planning items will ensure that you and your family are prepared for the future – both financially and personally. By organizing the items on this checklist you will be in a better position to put your mind at ease.

If you are a client of Copper Leaf Financial we can securely capture and maintain this information in your online Vault.



IMPORTANT CONTACTS

- Emergency _____
- Work _____
- Primary Doctor _____
- Financial Advisor _____
- Insurance Agent _____
- Attorney _____
- Other _____
- Location _____

VITAL DOCUMENTS

Gather and take photos of each and keep them in a safe place.

- Birth Certificate
- Social Security Card
- Passport
- Marriage Certificate
- Driver's License
- Armed Forces ID
- Citizenship Documents
- Divorce Decree
- Other _____
- Location _____

BILLS & LOANS

Have a recent account statement for each account and login/password for online management.

- Mortgage/Rent
- Vehicle Payments
- Loans
- Alimony/Child Support
- Other _____
- Location _____

INSURANCE INFO

- Health
- Life
- Disability
- Umbrella/Liability
- Car
- Property
- Long-Term Care
- Disaster
- Other _____
- Location _____

LEGAL DOCS & CONTRACTS

- Power of Attorney
- Last Will and Testament
- Trust Paperwork and Details
- Property Ownership/Rental (Deed/Lease/Contracts)
- Vehicle Ownership (Title/Agreement)
- Other _____
- Location _____

BANKING & ASSETS

This includes bank accounts, investments, and benefits. Have a recent account statement for each, location of related items and account/login and password for online management.

- Checking
- Savings
- Investment
- Stocks/Bonds
- Mutual Funds
- 401(k)
- Traditional IRA
- Roth IRA
- Pension (SEP/SARSEP)
- Military Benefits
- 403(b)
- Certificate of Deposit
- Other _____
- Location _____

CREDIT CARDS

- Primary Card
- Last Four Digits _____
- Expiration Date _____
- Secondary Card
- Last Four Digits _____
- Expiration Date _____
- Other _____
- Other _____

MEDICAL DOCUMENTS, CONDITIONS & PRESCRIPTIONS

Provide a copy and note location below.

- Advance Directive, which is a combination of your Living Will and naming a Health Care Proxy
- Do Not Resuscitate Orders (DNR)
- Physician Orders for Life-Sustaining Treatment (POLST)
- Medical Power of Attorney

Location _____

Take a photo of each prescription and document any medical issues you are currently managing, along with the methods of treatment for each condition.

- Name or Type of Medical Condition
- Prescription Required (medication name/doctor/pharmacy)
- Required Treatment

Location _____

Identify any life saving medication or devices you need in case of an emergency:

- Inhaler
- Epipen
- Insulin
- Other _____

Location _____

PASSWORDS & DIGITAL ACCOUNTS

Identify the devices and security you use and how someone you trust can access them.

- Mobile phone
- Computer(s)
- Wi-Fi
- Home Security

Other (example: Tablet) _____

How each can be accessed: _____

How do you currently keep track of your passwords?

- Password Manager
- Digital Document
- Physical Document

Documented information location: _____

Here's an overview of the types of accounts to focus on:

- Email
- Social Media
- Messaging/Communication Tools
- Entertainment (Video/Music/Gaming)
- Other (Example: Travel, Web hosting/Blogging) _____
- Shopping
- Cloud Storage (Photos/Videos/Files)
- Food/Delivery
- Money Management

Documented information location: _____

This list is intended to provide general guidance and may not include all essential items for your personal situation.

NOTES & PERSONAL THOUGHTS

Include additional information or personal thoughts.
