



## Estate Planning Essentials Checklist

### 1. Core Legal Documents

- **Last Will and Testament** – Names guardians, distributes assets.
- **Revocable Living Trust** (if applicable) – Avoids probate, manages complex or out-of-state assets.
- **Durable Power of Attorney** – Appoints someone to handle finances if you're incapacitated.
- **Health Care Surrogate** / Medical Power of Attorney – Appoints someone to make medical decisions.
- **Living Will** – States your end-of-life care preferences.
- **HIPAA Authorization** – Allows loved ones access to medical information.

### 2. Beneficiary Designations

- **Retirement accounts (401(k), IRA)** – Check/update beneficiary designations.
- **Life insurance policies**
- **Transfer on Death (TOD) or Payable on Death (POD) accounts**
- **Annuities or pensions**

### **3. Asset & Property Inventory**

- Real estate (homes, land, investment property)
- Bank accounts
- Investment accounts
- Business ownership/interests
- Vehicles, boats, other titled property
- Digital assets (cryptocurrency, online accounts, domain names)

### **4. Trust Funding (if applicable)**

- Re-title real estate in the name of your trust
- Assign business interests or LLC membership shares to trust
- Update beneficiaries or titles for life insurance, bank accounts, etc.

### **5. Family & Legacy Planning**

- Letter of Intent (care wishes, personal values)
- Guardian nomination for minor children
- Instructions for special needs family members
- Digital legacy instructions (passwords, digital accounts)
- Ethical will (optional)

### **6. Important Contacts**

10101 W. SAMPLE ROAD, SUITE 416, CORAL SPRINGS, FL 33065

TEL: 954.296.0493

EMAIL: [DENISELETTAUPA@PROTON.ME](mailto:DENISELETTAUPA@PROTON.ME)

WEBSITE: DENISELETTAUPA.COM

- Estate planning attorney
- Financial advisor
- CPA or tax professional
- Insurance agent
- Executor and/or trustee

## 7. Storage & Communication

- Store originals in a secure location (fireproof safe or attorney's office)
- Share copies with named agents (POA, healthcare surrogate)
- Keep a digital backup of key documents
- Communicate your plan with family and key decision-makers

## 8. Ongoing Maintenance

- Review your plan **every 3–5 years**
- Update documents after major life events:
  - Marriage/divorce
  - Birth/adoption
  - Death of a beneficiary
  - Major financial changes
  - Moving to another state