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## ESTATE PLANNING CHECKLIST

### Designation of Individuals

\* Please provide all individuals' full legal name(s) and current address \*

- List of individuals who you want to receive specific property
- Personal Representative / Successor Trustee (person in charge of your Trust Estate)
- Medical Patient Advocate and alternate advocate
- Financial Durable Power of Attorney and alternate power of attorney
- Guardian(s) for minor children

### Documents regarding the following Personal Property / Financial Accounts:

- Any/all Bank Accounts, CD's, Money Market
- Any/all Deeds to Real Property
- Any/all Life Insurance Policies
- Any/all 401(k), IRA, Annuities, etc.
- Any/all Stocks and Bonds
- List of any/all Personal Property / Vehicles

Notes: \_\_\_\_\_  
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