FROM “IN CASE ANYTHING HAPPENS”

Estate Planning Checklist

The six documents, which ones you can do yourself, and the step everyone skips: making them findable.

THE SIX DOCUMENTS

DONE	DOCUMENT	WHAT IT DOES	DO IT YOURSELF?
☐	Will	Who gets what, the executor, guardians for minor children	Simple situations: often do-it-yourself. Blended families, businesses, or conflict: lawyer
☐	Living will (advance directive)	Your medical-treatment wishes if you can’t speak for yourself	Yes — most states provide free forms
☐	Health care proxy / medical POA	The person who makes medical decisions for you	Yes — usually the same free state forms
☐	Durable financial power of attorney	Who can handle money, bills, and property if you’re incapacitated	Talk to a lawyer — banks are strict about these
☐	Beneficiary designations	Who directly receives each retirement account, life policy, payable-on-death account	Yes — set with each institution, free. They override the will
☐	Living trust (not everyone)	Holds assets so they pass outside probate	Lawyer territory

Organizer’s list: what to make and where to keep it. Not legal, financial, tax, or medical advice. Full explanations and sources: incaseanythinghappens.com/blog/estate-planning-checklist

THE STEP EVERYONE SKIPS — FINDABLE AND USABLE

- [ ] **Originals in one findable place** — a home safe or fireproof pouch beats scattered folders
- [ ] **The safe-deposit-box trap** — if only you can open it, add a co-renter or keep originals elsewhere
- [ ] **Copies to the people named** — health proxy holds the proxy; POA agent knows where the original is; doctor holds the directive
- [ ] **Write down where everything lives** — documents, accounts, the attorney's name
- [ ] **The digital layer** — Apple Legacy Contact and Google Inactive Account Manager, three minutes each
- [ ] **Review on a schedule** — yearly, plus after any major life change

WRITE IT HERE

Where the originals are

Who has copies, and of what

Attorney's name and phone, if any

I review this every year in the month of