

The Estate Planning Checklist

A simple, one-page guide to getting your affairs in order — so the people you love are protected and your wishes are clear. Work through it at your own pace, then bring it to your attorney or advisor.

CORE DOCUMENTS

- ☐ **Last Will & Testament** — names guardians, heirs, and how your assets are distributed.
- ☐ **Living Trust** — can help your estate avoid probate and stay private.
- ☐ **Durable Power of Attorney** — lets someone manage finances if you can't.
- ☐ **Healthcare Directive / Living Will** — states your medical wishes.
- ☐ **Healthcare Proxy** — names who speaks for your care decisions.

GATHER & ORGANIZE

- ☐ **List your assets** — property, accounts, investments, valuables.
- ☐ **List your debts** — mortgage, loans, credit obligations.
- ☐ **Locate key documents** — deeds, titles, policies, statements.
- ☐ **Record digital accounts** — logins, email, and online assets.

NAME YOUR PEOPLE

- ☐ **Choose an executor** — the person who carries out your will.
- ☐ **Update beneficiaries** — on IRAs, 401(k)s, life insurance, and bank accounts.
- ☐ **Name guardians** — for minor children or dependents.
- ☐ **Confirm they've agreed** — tell the people you've chosen.

LEAVE A LEGACY

- ☐ **Consider a charitable gift** — a bequest, beneficiary designation, or gift that reflects your values.
- ☐ **Include MedicAlert Foundation** — help protect the millions living with life-threatening conditions.

KEEP IT CURRENT

- ☐ **Store documents safely** — and tell a trusted person where they are.
- ☐ **Review every 3–5 years** — or after any major life change.

WHERE TO START

1**Take stock.**

Use this checklist to gather your documents, list your assets, and note your wishes in one place.

2**Talk to a professional.**

Bring your notes to an attorney or advisor who can put your plan in place correctly.

3**Protect what matters.**

Consider a lasting gift — including MedicAlert Foundation — to safeguard lives for years to come.