



# **BASIC ESTATE PLANNING CHECKLIST**

## **1. DURABLE POWER OF ATTORNEY FOR FINANCES**

Designate who handles your finances if you are no longer able to make your own decisions.

## **2. DURABLE HEALTHCARE POWER OF ATTORNEY**

Designate who makes medical decisions for you and what your wishes are related to healthcare.

## **3. BENEFICIARY DESIGNATIONS FOR:**

- 1. BANK ACCOUNTS**
- 2. LIFE INSURANCE**
- 3. RETIREMENT ACCOUNTS (401K/IRA)**

## **4. DMV VEHICLE TRANSFER ON DEATH**

This allows you to name a beneficiary on the title of any car(s) you own outright. A copy of this is available for download on HLC Legal's website.

## **5. TRANSFER UPON DEATH DEED FOR ANY LAND, HOUSES OR OTHER REAL PROPERTY**

This allows your property to avoid probate. However, there are some drawbacks which you may wish to discuss with your attorney.

## **6. FUNERARY ARRANGEMENTS**

## **7. DIGITAL ASSETS**

Remember to ensure someone can access your digital passwords and accounts. Best practice would be to keep the passwords and the usernames in separate locations.

## **8. WILL**

## **9. IF YOU ARE A SENIOR:**

- a. SOCIAL SECURITY CONSENT FOR RELEASE OF INFORMATION**
- b. MEDICARE AUTHORIZATION TO DISCLOSE PERSONAL HEALTHCARE INFORMATION**

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