

Your Employee Assistance Program is a support service that can help you take the first step toward change.

Estate Planning Checklist

	Yes	No
Inventory of physical Items (jewelry, collectibles, cars etc.		
Inventory of non-physical items (401K plans, stocks, insurance policies etc.)		
Up-to-date and signed will		
Designated executor or power of attorney		
A backup executor or power of attorney		
Designated guardianship of minor children		
Beneficiary designations up to date		
All dependants provided for		
Trusts established		
Living will or medical directive		
Update life insurance and annuities		
Inform executor/spouse/children where to find necessary documents and financial information (will, bank accounts, tax records, etc.)		
Estimate cost of probating will		
Business succession plan in place		

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Funeral instructions and wishes

Prepay funeral

Wishes regarding organ donation