Estate Planning from Home

A Checklist

Aside from talking to your attorney, here are some things that you can do on your own while sheltering in place.

Talk to Your Heirs

- About how can they get information in case of incapacity or death
  - Whom should they contact?
  - Where are your important documents kept?
  - How can they access electronic information?
- About your wishes
  - For end-of-life care?
  - For burial/cremation?
  - For funeral arrangements?
- About how to access basic financial information
  - Who is your accountant?
  - Who is your financial advisor?
  - What life insurance do you have and where are the policies?
  - What debts and charitable pledges are outstanding?

Get Organized

- Have a paper file of information to access in case of incapacity or death. Include instructions on accessing your digital information, such as through your password manager.
- Use a password manager (e.g., LastPass, 1Password) to keep your passwords in one place.
  - Set up the emergency contact feature.
  - Document access to devices and location of any hidden cash or tangibles in secure notes.
- Review emergency contact features on all email and social media accounts.
- Digitize and back up important family photos and videos. If using cloud backup, ensure successor access through password management.

Catalog Your Tangible Personal Property

- Take a picture of all valuables.
- Create a paper or digital book of tangibles. For each item:
  - Describe the item.
  - If it has a story, share the story.
  - Attach any proof of ownership and receipt, if any.

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- Review insurance coverage for valuables.
- If you want items to pass to named individuals on death, write a letter as instructed by your attorney. Invite your family to tell you the items that are meaningful to them as you make your decisions.

Review Asset Titling

- If you have a revocable trust, review any assets that need to be transferred to the trust.
- Call your retirement plan custodians and insurance companies to ask for a copy of the beneficiaries named on record. Send a copy to your attorney.

Have questions? Contact our team.

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