

Estate Planning Binder Checklist

The eight sections a client keeps, and what goes behind each tab.

☐ Tab 1 Will

- ☐ Signed will, or a copy and where the original is kept
- ☐ Codicils
- ☐ Personal property memorandum or letter of wishes

☐ Tab 2 Revocable Living Trust

- ☐ Trust agreement
- ☐ Amendments and restatements
- ☐ Certificate of trust
- ☐ Schedule of assets funded into the trust

☐ Tab 3 Power of Attorney

- ☐ Durable financial power of attorney
- ☐ Names and contact details of the agent and successor agents

☐ Tab 4 Healthcare Directive

- ☐ Healthcare power of attorney
- ☐ Living will
- ☐ HIPAA authorization

☐ Tab 5 Beneficiary Designations

- ☐ Retirement accounts (IRA, 401(k))
- ☐ Life insurance
- ☐ Transfer-on-death and payable-on-death accounts
- ☐ Confirmation copies from each institution

☐ Tab 6 Asset Inventory

- ☐ Real estate deeds
- ☐ Bank and brokerage account list
- ☐ Business interests
- ☐ Vehicles and other titled property

☐ Tab 7 Insurance

- ☐ Life and long-term care policies
- ☐ Homeowner and umbrella policies
- ☐ Agent contact details

☐ Tab 8 Important Contacts

- ☐ Attorney, financial advisor and CPA
- ☐ Executor, trustee and agents
- ☐ Family members to notify

Have these 8 sections printed as tabs



Scan or click: the designer opens with these sections filled in,
priced instantly, with a free PDF proof before anything prints.