



**Personal Estate Planning Checklist for:** \_\_\_\_\_

Let's start with a realistic assessment of where you are in building a solid estate plan. Use this checklist to gauge your progress and plan for your important next steps.

**A. Identify and gather the following:**

- The most recent copy of wills and/or trusts
- Up-to-date list of all assets, including real estate, investments & retirement
- Copies of deeds and business documents
- List of family members and their contact information
- List of beneficiaries (primary and alternate) and their contact information
- I/we have decided on representatives (primary and alternate) and have their current contact information:
  - o Patient Advocate \_\_\_\_\_
  - o Power of Attorney for Finances \_\_\_\_\_
  - o Trustee (Individual or Professional)\* \_\_\_\_\_
  - o Guardian for Minor or Disabled Children \_\_\_\_\_
- How I/we want assets divided & distributed
- A list of specific gifts of personal property

**B. Consider your resources. Are they providing the level of service you want and deserve?**

- Investments & Financial Planning \_\_\_\_\_
- Legal Matters \_\_\_\_\_
- Accounting & Tax Matters \_\_\_\_\_
- Existing Trusts \_\_\_\_\_

### C. Commit to filling in the gaps that you can.

Tasks to Complete	Target Date	Completion Date

### D. Don't have all the answers? Reach out to Credit Union Trust.

The Credit Union Trust team offers significant trust and estate planning experience backed by the team spirit of people helping people. We are here to help you take the next best step—and there is no charge for the conversation.

**Call 877.730.6109 or email [info@credituniontrust.com](mailto:info@credituniontrust.com) to share your questions or schedule an appointment.**

### Notes & Questions for Credit Union Trust:

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\*Note: There are two types of trustees: individual and professional. Professional trustees like Credit Union Trust are regulated fiduciaries that undergo regular audits and are insured. (Individual trustees don't offer those same protections.)

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