

# Annual Estate Planning Checklist

## Planning Ahead Provides Many Advantages

Times of crisis or bereavement often come unexpectedly. Knowing where to find important information can make a difference.

The following is a list of informational items you can assemble to help your loved ones manage your affairs if you become incapacitated or at the time of your death. The **elder law attorneys** at **Korsinsky & Klein, LLP** recommend that you review and update this list annually, recording exactly where all the information is located. Many of our clients do this every April or May during the season for "spring cleaning."

## CHECKLIST

### ☐ **Professionals List** *(all contact information)*

- Doctors: primary care and specialists
- Attorneys
- Accountants / financial advisors
- Insurance brokers

### ☐ **Important Documents Packet** *(originals and copies):*

- Social Security card
- Birth certificate
- Driver's license
- Marriage certificate
- Divorce certificate
- Passports
- Medicare / Medicaid insurance card
- Life insurance policies
- Trusts
- Military discharge papers
- Deeds and titles
- Tax returns *(last six years)*
- Instructions on locations of all files
- Medical Information *(list allergies, medications, treatments, major operations, immunization records)*

### ☐ **Financial Accounts List** *(all contact information and account numbers)*

- Bank accounts
- Investment brokerage accounts *(list stocks, bonds, CDs)*
- Credit / debit cards

### ☐ **Financial Assets List**

- Real estate holdings
- Mortgage documents
- Trusts
- Loans *(owed or owed to them)*
- Tax returns
- Insurance policies *(home, auto, health, life, long-term care)*
- Invoices for important possessions
- Partnership documents
- Car ownership
- Jewelry and valuables
- Safe combination / directions
- Location of safety deposit key

### ☐ **Sources of Income**

- Annuities
- Social Security
- Pensions
- Retirement account distributions
- VA benefits
- Disability payments

### ☐ **Recurring Bills**

- Mortgage
- Loans
- Utilities *(Internet, phone, electric, gas, cable)*

### ☐ **Computerized Information**

- Email accounts and passwords
- Password for computer / phone
- Recurring online billing

### ☐ **Estate Planning Documents**

- Power of attorney
- Healthcare directive / living will
- Will
- Trusts
- Instructions regarding personal property
- Healthcare proxy
- Do not resuscitate (DNR) order
- Retirement plans
- Disability plans
- Government benefits for which you are eligible

### ☐ **End of Life Arrangements**

- Cemetery plot ownership
- Pre-planned burial papers
- Personal statement regarding burial services

### ☐ **Date Updated:** \_\_\_\_\_



Call us at 212-495-8133 to learn more about the benefits of creating an estate plan today.