



## DEXITPLAN

# YOUR ESTATE PLANNING CHECKLIST

Use this as your personal manual to plan how your assets, property, and end-of-life wishes will be managed if you become incapacitated or pass away

### Last Will and Testament

- Names beneficiaries and a guardian for minors
- Appoints an executor

### Living Trust / Revocable Trust (if applicable)

- Allows assets to bypass probate
- Manages property during life and after death

### Durable Power of Attorney (Financial)

- Authorizes someone to manage your financial affairs if you're incapacitated

### Healthcare Power of Attorney (Medical POA)

- Authorizes someone to manage your financial affairs if you're incapacitated

### Advance Healthcare Directive / Living Will

- States your preferences for end-of-life care

### HIPAA Authorization

- Gives specific people access to your medical records

### Funeral and Burial Instructions

- Optional but helpful for family; may be in the will or separate document

### Digital Estate Plan

- Provides instructions for online accounts, social media, digital files