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Estate Planning Documents Checklist

Personal Information

Legal name _____ Gender Pronoun Preference _____
Spouse's Legal Name _____ Gender Pronoun Preference _____
Address _____ Phone _____

Children's Information/Guardian

Legal names of all children _____ DOB _____
_____ DOB _____
_____ DOB _____
Legal name of Guardian _____
Address of Guardian _____
Legal name and address of Alternate Guardian _____

Specific Gift of Property These are stated gifts of property to stated individuals, e.g., your home at [address] to your son. Please use an extra sheet of paper if necessary. New York law allows personal effects to be distributed by a Letter of Instruction addressed to your executor and kept with your will. It is a more efficient way to deal with personal items and is easier to change than re-doing the will.

Legal name and address of beneficiary _____
Specific gift of property _____

Remainder of Your Estate (What is left in your estate after all debts, expenses, taxes, and specific bequests have been satisfied.) The remainder of an estate is commonly distributed in the following order: first to your spouse, then to your children, then to any remaining heirs. Please indicate below how you would like the remainder of your estate to be distributed.

1. Specific instructions as to the remainder of your estate: _____

2. Legal name and address of beneficiary _____
Relationship to you _____
 Legal name and address of beneficiary _____
Relationship to you _____
 Legal name and address of beneficiary _____
Relationship to you _____

Executor

The executor is the person who serves to settle your estate. You can choose a professional executor or non-professional executor. Most people choose a non-professional such as their spouse, parent, or an adult child. The executor must act as a fiduciary and must be both competent and trustworthy. Your nominee for executor may decline or be unable to serve as your executor, in which case a designated alternate may serve as your executor.

- 1. Do you want your spouse to be your primary Executor? Yes No N/A
- 2. If not spouse, Executor's legal name _____
- 3. Alternate Executor's legal name _____

Durable Power of Attorney (POA)

Grants Agent the authority to act in your place and survives your incapacity.

- 1. Do you want your spouse to be your primary POA Agent? Yes No N/A
- 2. If not spouse, POA Agent's legal name _____
Address _____
- 3. Alternate POA Agent's legal name _____
Address _____

Health Care Proxy (HCP)

Who do you designate to make health care decisions for you if you are unable?

- 1. Do you want your spouse to be your primary HCP Agent? Yes No N/A
- 2. If not spouse, HCP Agent's legal name _____
Address _____
- 3. Alternate HCP Agent's legal name _____
Address _____

Living Will

Would you like continued medical treatment if there is no reasonable expectation for your recovery? Y / N
If no, please specify any limitations, such as a feeding tube, hydration, etc.

Notes