



Estate Planning Checklist

This worksheet is designed to help you ensure that you have covered all five aspects of the estate planning process, and to bring peace of mind to you and your loved ones.

Once you've completed each of the documents below, store them in a safe place and tell your family members where they are located.

- Complete the HIPAA Authorization and Release Form.
 - a. Generally, you can obtain a free HIPAA Authorization and Release Form from a medical provider.
 - b. You may also consult an estate attorney for the form.
- Name a health care proxy on a Medical Power of Attorney Form.
 - a. Generally, you can obtain a free Medical Power of Attorney Form at a local hospital.
- Complete an Advance Health Care Directive (also known as a living will).
 - a. Generally, you can obtain a free Advance Health Care Directive Form at a local hospital.
- Name a financial agent on a Financial Power of Attorney Form.
 - a. It is possible to complete financial power of attorney forms through online legal services. Be sure to research the online provider and ensure the services and documents address your needs. If you are not certain and/or need additional guidance, please consult an estate attorney.
 - b. You may consult an estate attorney for professional advice on the designation of your power of attorney and the completion of appropriate forms.
 - c. Please note that some banks and brokerage companies have their own durable power of attorney forms.
- Create a will.
 - a. It is possible to create a will through online legal services. Be sure to research the online provider, and ensure that the services and documents address your needs. If you are not certain and/or need additional guidance, please consult an estate attorney.
 - b. You may consult an estate attorney for professional advice on the development of your will.

PLEASE NOTE THAT ALL THE FORMS LISTED ABOVE MUST BE NOTARIZED TO BE OFFICIAL DOCUMENTS.

