



## Family Legal Planning Checklist

\_\_\_\_\_ **Will** (Designates guardian and distributes assets to trust.)

\_\_\_\_\_ **Trust** (Prevents children from receiving full access to inheritance at age 18, maintains privacy, and allows trustee to allocate trust funds according to children's needs.)

\_\_\_\_\_ **Standby Guardianship Document** (Designates guardian in the event of your incapacity.)

\_\_\_\_\_ **Power of Attorney** (Authorizes designated person to manage your family's finances in the event you are incapacitated.)

\_\_\_\_\_ **Healthcare Proxy** (Authorizes designated person to make medical decisions for you in the event you are incapacitated.)

\_\_\_\_\_ **Beneficiary Designations** (Assign beneficiary designations to align with overall estate plan.)

\_\_\_\_\_ **Inventory of Assets** (Ensures all your assets will be preserved and transferred to your family.)

\_\_\_\_\_ **List of Digital Assets with Passwords** (Ensures your digital assets will be accessible to your family.)

\_\_\_\_\_ **Letter to Trustee** (Provides guidance to trustee on how you'd like funds to be used.)

\_\_\_\_\_ **Letter to Guardian** (Provides important information about your children, such as doctors's info, medical issues, allergies, etc. and guidance in raising your children, e.g., religious upbringing, family traditions, public or private education.)