



LFF Estate planning checklist

10 Important documents to consider:

1. Last will and testament:

- Name a guardian for minor children
- Name a guardian for your pets
- List all personal property and decide which people/charities you want to receive each asset
- Name an executor to carry out the terms of your will

2. Revocable living trust (you can change during life):

- List all personal property and decide which people/charities you want to receive each asset
- Transfer your personal property into the trust
- Name a successor trustee to manage your trust after you pass away

3. Beneficiary designations:

- Name a beneficiary for all non-probate assets, including:
 - 401(k) and IRA accounts, Life insurance policies, Pensions

4. Advance Healthcare Directive (including a Medical Power of Attorney):

- Outline your medical care preferences in your "Living Will"
- Name a healthcare agent to make important medical decisions for you in your "Medical Power of Attorney"

5. Financial Power of Attorney:

- Choose a financial agent to make important financial decisions for you
- If you want your agent to donate to charity for you, specify which charities and how much they should receive (i.e. Legacy of Faith Foundation)

6. Insurance policies & finance info.:

- Gather copies of your life, health, car, and home insurance policy documents
- Create a list of your financial accounts and institutions (e.g., bank accounts, credit cards, mortgages, loans)

7. Proof of Identity documents:

- Gather your proof of identity documents:
 - Social Security card, Birth, marriage, and divorce certificates, Prenuptial agreements

8. Titles and property deeds:

- Gather the titles and deeds for your homes, vehicles, and real estate. (Confirm the listed owner is correct.)
- If you've established a trust, retitle your property so the trust is the owner

9. Digital logins and passwords:

- Consider naming a digital executor in your will
- Create a list of all your digital assets:
 - Bank & financial accounts, Social media & email accounts, Logins for streaming services, Digital files, like photos & documents

10. Funeral instructions

- Create a list of your funeral preferences:
 - Burial, cremation, etc., Type of service, passages you want read, Preferred charities for donations, Whether or not you prefer flowers