Estate Plan Review Checklist

Use this checklist to review your estate plan and ensure your documents, beneficiary designations, fiduciaries, and assets are up to date.

Step 1: Review Your Existing Documents

☐ Will or Trust
☐ Durable Power of Attorney
☐ Advance Healthcare Directive
☐ Guardianship Nominations for Minor Children (if applicable)
☐ If any documents are missing or outdated, schedule an estate plan review.

Step 2: Review Beneficiaries

☐ Review retirement account beneficiaries
☐ Review life insurance beneficiaries
☐ Review payable-on-death (POD) account beneficiaries
☐ Confirm trust beneficiaries are current and accurate

Step 3: Confirm Asset Ownership

☐ Verify real estate is titled correctly
☐ Confirm major financial accounts are properly titled
☐ Ensure assets intended for your trust are properly funded into the trust
☐ Consult an estate planning attorney if you are unsure

Step 4: Review Fiduciaries

☐ Review your trustee selections
☐ Review your executor selections
☐ Review your financial and healthcare agents
☐ Consider age, location, and life circumstances of fiduciaries
☐ Confirm fiduciaries are still willing and able to serve

Step 5: Consider Life Changes

☐ Marriage
☐ Divorce
☐ Birth or adoption of children

- ☐ Death of a family member
- ☐ Major financial changes
- ☐ Relocation or property acquisitions

Step 6: Plan for Incapacity

- ☐ Confirm someone can manage your finances if you become incapacitated
- ☐ Confirm someone can make healthcare decisions on your behalf
- ☐ Discuss fiduciary options with an experienced attorney

Step 7: Address Digital Assets

- ☐ Create instructions for social media accounts
- ☐ Create instructions for online banking and digital accounts
- ☐ Document passwords and account access information securely
- ☐ Include digital property instructions in your estate plan

Need Help Updating Your Estate Plan?
Contact Astria Law Group, PC at 877-405-6446 to schedule a consultation and ensure your plan reflects your current wishes and protects your loved ones.