

Afsar Estate Planning

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Providing Estate Plans Expertly, Efficient & Affordably

Estate Planning Checklist

DURABLE POWER OF ATTORNEY

Do you have the original?

Is it a Durable Power of Attorney (DPOA)?

When was it prepared? (Some financial institutions may not accept DPOAs older than 5 years)

Is it immediate or springing? (Is it only effective after determination of incapacity?)

Does it include the power to sell real estate?

Does it include the power to gift?

Did you name alternate attorneys in fact?

Where was it prepared?

ADVANCE HEALTH CARE DIRECTIVE (AHCD)

Do you have the original?

Did you name alternate agents?

Does the AHCD a medical directive/information regarding your end-of-life wishes?

Have you provided a copy to your doctor to keep as part of the medical record?

LAST WILL & TESTAMENT

Do you have the original Will in a safe place or know the location of the original?

Does Will include a Testamentary Letter of Intent naming a beneficiary for personal property items?

Does Will allow the executor/personal representative to access digital assets including e-mail accounts?

Has your executor/personal representative appointments still the ones you want to manage your Trust?

Has your executor passed away or become medically incapacitated or judicially incompetent?

TRUST

Have you reviewed beneficiary designations on accounts to ensure they are consistent with your wishes?

Is your Trust revocable or irrevocable?

Has your Trustee or Beneficiaries died or become medically incapacitated or judicially incompetent?

Have you reviewed the titling of your home to ensure they are in the name of the Trust?

Do you have signed copies of the original Trust instrument and all amendments?

Does your Trust include a Schedule A?

Have your real estate assets, been retitled into the name of the Trust?

Do you have successor Trustees named?