- ❑ 11. Key contacts (names, addresses and telephone numbers).
    - a. Brokers.
    - b. Financial advisors.
    - c. Accountants.
    - d. Lawyers.
    - e. Doctors.
    - f. Insurance agents.
    - g. Family members.
    - h. Friends.
- ❑ 12. Wishes regarding care at the end of life.
    - a. Do you have long term care insurance?
    - b. Do you want to be cared for in your own home or in a facility?
    - c. Your wishes regarding use or withdrawal of life support.
    - d. Your wishes regarding organ donation.
- ❑ 13. Funeral and burial/cremation.
    - a. Have you prearranged for services?
        - (i) Where?
        - (ii) Is this prepaid?
    - b. Do you have cemetery plots?
        - (i) Where?
        - (ii) Where is the Deed?
    - c. Do you want an obituary, viewing, and funeral ceremony?
    - d. Discuss these wishes with your next-of-kin.
- ❑ 14. Pets.
    - a. Who will take care of your pets if you are temporarily unable to do so?
    - b. Who will take your pets upon your death?
    - c. Does this person know which vet you use?
    - d. Do you want to provide a sum of money to be used for care of pets in the event of your death?

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ESTATE PLANNING

CHECKLIST of CONCERNS
As We Get Older

BEIER HOWLETT
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CHECKLIST of CONCERNS As We Get Older

Someone should have the following knowledge of your affairs, or you should have a list containing the following types of information where it can be found easily if needed. Someone should know where your list is located.

- [ ] 1. **Do you have an estate plan?**
    - a. Will.
    - b. Trust.
    - c. Durable Power of Attorney.
    - d. Patient Advocate Designation.
- [ ] 2. **List of assets.**
    - a. What are they?
    - b. Cost basis for income tax purposes.
    - c. Who owns them?
    - d. Are they just in your name?
    - e. Are they joint with any one else – if so, who are the other joint owners?
    - f. Are they "in trust for" accounts – if so, who are the beneficiaries?
    - g. Are they registered in the name of your estate planning trust?
    - h. Who are the beneficiaries of:
        - (i) Your insurance contracts.
        - (ii) Your IRA or other qualified plan benefits.
        - (iii) Any other benefits or contracts where you have the right to designate a beneficiary.
- [ ] 3. **Where do you keep your important documents?**
    - a. Deeds, land contracts, mortgages, etc.
    - b. Titles to cars, boats, etc.
    - c. Stock certificates.
    - d. Bank passbooks and bank account information.
    - e. Birth certificates, marriage certificates, etc.
    - f. Military service records.
    - g. Wills and trusts and other similar documents.
- [ ] 4. **Do you have a safe deposit box?**
    - a. Where is it located?
    - b. Where is the key?
    - c. Who can obtain entry to the box?
- [ ] 5. **Tax returns.**
    - a. Where are your records maintained?
    - b. Who does your tax returns?
    - c. Where do you keep your tax returns?
    - d. Includes income, gift and other tax returns.
    - e. Where do you keep a record of your estimated tax payments?
- [ ] 6. **What key bills do you have to pay – how will they be paid if you can't pay them?**
    - a. Medical insurance premiums.
    - b. Other insurance premiums.
        - (i) Homeowners.
        - (ii) Car.
        - (iii) Umbrella.
        - (iv) Disability.
        - (v) Life.
        - (vi) Long term care.
    - c. Mortgage payments.
    - d. Credit card charges.
        - (i) What cards do you have and where are they?
        - (ii) Does anyone else have the right to use these?
        - (iii) Are any items automatically charged to the account?
    - e. Property taxes.
    - f. Income taxes
    - g. Rent payments.
    - h. Expenses in connection with home (includes such items as fuel oil contracts, yard maintenance, snow removal, utility bills, etc.).
- [ ] 7. **Secret hiding places for keys, records, cash, etc.**
- [ ] 8. **Computer passwords, PIN's, etc.**
- [ ] 9. **Medical Information.**
    - a. Doctors.
    - b. Hospitals.
    - c. Drugs taken.
    - d. Who prescribes your drugs and where do you obtain them?
    - e. Insurance plans.
- [ ] 10. **Monies you receive periodically – where are they deposited?**
    - a. Social security.
    - b. Pensions.
    - c. GI pensions.
    - d. Dividends, interest, etc.
    - e. Annuities.
    - f. Consider using direct deposit for part or all of the above.