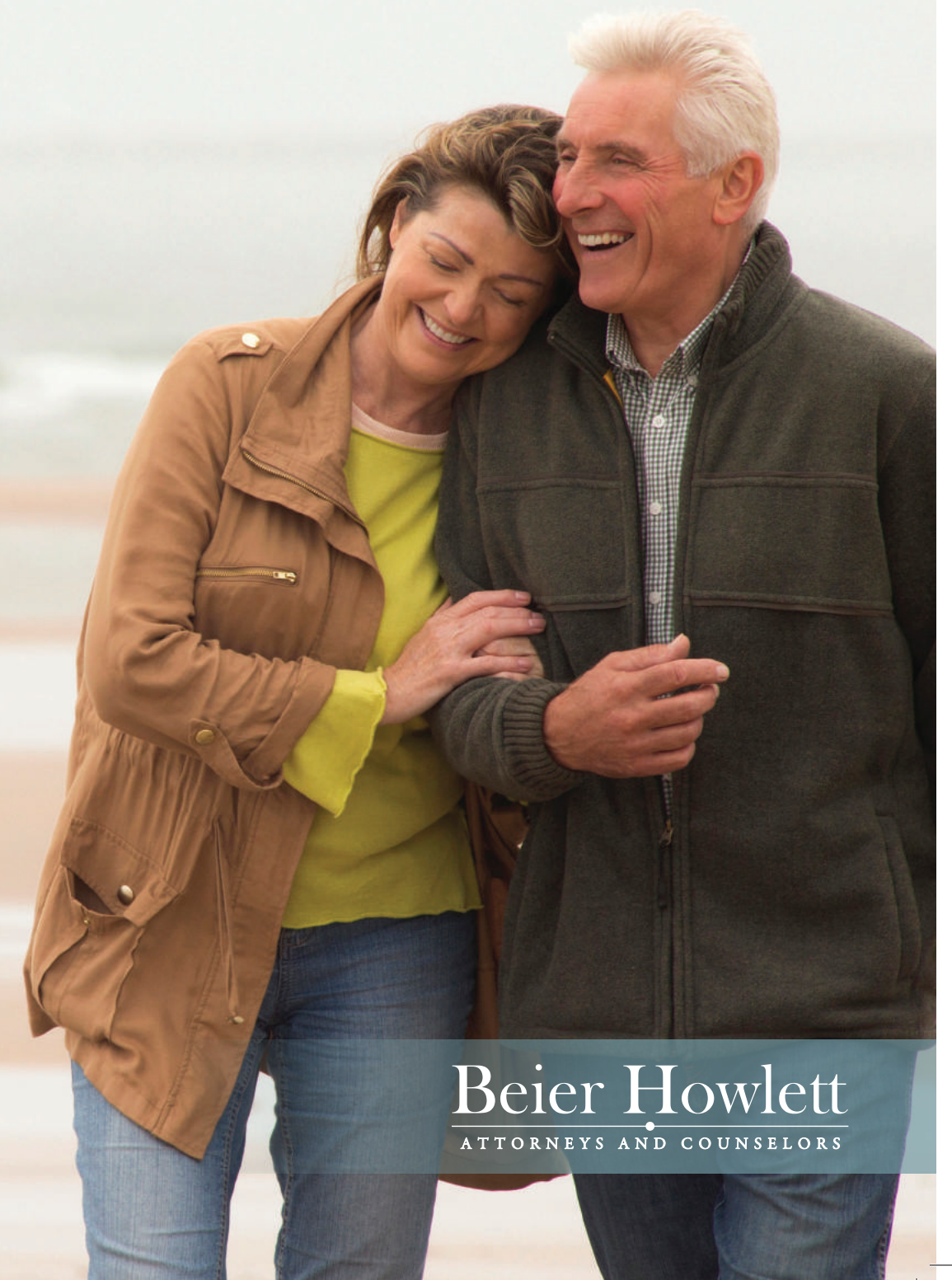


*As part of a
comprehensive estate plan, someone
should have detailed knowledge of
your affairs, or at least a list of where
the information referred to in this
Checklist may be found.*

*At Beier Howlett
we can help you review this
information and prepare appropriate
estate plan documents.*

CHECKLIST of
INFORMATION
your family needs to know



Beier Howlett
ATTORNEYS AND COUNSELORS

3001 W. Big Beaver Rd., Suite 200
Troy, Michigan 48084
P 248-645-9400 F 248-645-9344
www.bhlaw.us.com

Beier Howlett
ATTORNEYS AND COUNSELORS

CHECKLIST OF INFORMATION

○ DO YOU HAVE AN ESTATE PLAN?

- 1. Will
- 2. Trust
- 3. Financial Durable Power of Attorney
- 4. Durable Power of Attorney for care of minor or incapacitated person
- 5. Patient Advocate Designation
- 6. Authorization to Disclose Medical Information
- 7. Designation of Funeral Representative

○ LIST OF ASSETS

- 1. What are they?
- 2. Cost basis for income tax purposes
- 3. Who owns them?
- 4. Are they just in your name?
- 5. Are they joint with anyone else—if so, who are the other joint owners?
- 6. Are they “in trust for” accounts—if so, who are the beneficiaries?
- 7. Are they registered in the name of your estate planning trust?
- 8. Who are the beneficiaries of:
 - (a) Your insurance contracts
 - (b) Your IRA or other qualified plan benefits
 - (c) Any other benefits or contracts where you have the right to designate a beneficiary
 - (d) Always name both a primary beneficiary and an alternate beneficiary

○ WHERE DO YOU KEEP YOUR IMPORTANT DOCUMENTS?

- 1. Deeds, land contracts, mortgages, etc.
- 2. Titles to cars, boats, etc.
- 3. Stock certificates
- 4. Bank passbooks and bank account information
- 5. Birth certificates, marriage certificates, passports, etc.
- 6. Military service records
- 7. Wills and trusts and other similar documents

○ DO YOU HAVE A SAFE DEPOSIT BOX?

- 1. Where is it located?
- 2. Where is the key?
- 3. Who can obtain entry to the box?

○ TAX RETURNS—INCOME, GIFT, EMPLOYMENT, OTHER

- 1. Where are your records maintained?
- 2. What returns do you file?
- 3. Who does your tax returns?
- 4. Where do you keep your tax returns?
- 5. Where do you keep a record of your estimated tax payments?

○ WHAT KEY BILLS DO YOU HAVE TO PAY, AND HOW WILL THEY BE PAID IF YOU CAN'T PAY THEM?

- 1. Medical and prescription drug insurance premiums
- 2. Other insurance premiums
 - (a) Homeowners
 - (b) Car
 - (c) Umbrella
 - (d) Disability
 - (e) Life
 - (f) Long term care
- 3. Mortgage payments
- 4. Credit card charges
 - (a) What cards do you have and where are they?
 - (b) Does anyone else have the right to use these?
 - (c) Are any items automatically charged to the account?
- 5. Property taxes
- 6. Income taxes
- 7. Rent payments or condo association fees
- 8. Expenses in connection with home (includes such items as fuel oil contracts, yard maintenance, snow removal, utility bills, etc.)
- 9. What bills are paid automatically and from which accounts?

○ SECRET HIDING PLACES FOR KEYS, RECORDS, CASH, ETC.

○ DO YOU HAVE DIGITAL ASSETS?

- 1. What social network, financial, photo, music, auction, gaming and cloud storage digital accounts do you have?
- 2. Have you chosen someone to administer your digital assets?
- 3. Should this person have access to both the catalog and content of all, or only selected, electronic communications?
- 4. What should happen to the content of these accounts upon your death?
- 5. Does someone know your user names, passwords, PINs?

○ MEDICAL INFORMATION

- 1. Doctors
- 2. Hospitals
- 3. Drugs taken
- 4. Who prescribes your drugs and where do you obtain them?
- 5. Insurance plans
- 6. Any rented medical equipment? If so, from where?
- 7. Where are your medical records maintained?
- 8. Allergies, implants, significant medical conditions
- 9. Do you have caregivers?
 - (a) List names and phone numbers
 - (b) Who handles caregivers' employment taxes?
- 10. Is anyone dependent on you for care?

○ MONIES YOU RECEIVE PERIODICALLY—WHERE ARE THEY DEPOSITED?

- 1. Social security
- 2. Pensions
- 3. GI pensions
- 4. Dividends, interest, etc.
- 5. Annuities
- 6. IRA and 401k required minimum distributions
- 7. Consider using direct deposit for part or all of the above

○ KEY CONTACTS (NAMES, ADDRESSES, PHONE NUMBERS)

- 1. Brokers
- 2. Financial advisors
- 3. Accountants
- 4. Lawyers
- 5. Doctors
- 6. Insurance agents
- 7. Family members
- 8. Friends

○ WISHES REGARDING CARE AT THE END OF LIFE

- 1. Do you have long term care insurance?
- 2. Do you want to be cared for in your own home or in a facility?
- 3. Your wishes regarding use or withdrawal of life support
- 4. Your wishes regarding organ donation

○ FUNERAL AND BURIAL/CREMATION

- 1. Have you named a Funeral Representative?
- 2. Have you prearranged for services?
 - (a) Where?
 - (b) Is this prepaid?
- 3. Do you have cemetery plots?
 - (a) Where?
 - (b) Who may be buried there?
 - (c) Where is the Deed?
- 4. Do you want an obituary, viewing, and funeral ceremony?
- 5. Discuss these wishes with your next-of-kin

○ PETS

- 1. Who will take care of your pets if you are temporarily unable to do so?
- 2. Who will take your pets upon your death?
- 3. Does this person know which vet you use?
- 4. Do you want to provide a sum of money to be used for care of pets in the event of your death?