

# Estate Planning Checklist

## Your Family

Your Name \_\_\_\_\_

Spouse/Partner Full Name \_\_\_\_\_

Children: Names & Dates of Birth \_\_\_\_\_

(indicate of child of current or previous relationship, special needs)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Your Assets

Real Estate

home, rental properties, timeshare, other

\_\_\_\_\_

\_\_\_\_\_

Bank Accounts

checking, savngs,. money market, brokerage

\_\_\_\_\_

Stocks, Bonds, Investments

both retirement and non-retirement

\_\_\_\_\_

Business Interests

Corporations, LLCs, Partnerships

\_\_\_\_\_

Other Assets

Oil/Gas rights, performance royalties, etc.

\_\_\_\_\_

## Your Desires

Guardians: (if your children are minors)

\_\_\_\_\_

Trustees/Executors

who should take over either when you are incapacitated or have passed away?

\_\_\_\_\_

Financial Agents

who should make financial decisions? (Good for your lifetime only)

\_\_\_\_\_

Medical Agents (who should make medical decisions?)

\_\_\_\_\_

Desires for End of Life/Organ Donations/  
Burial/Cremation Preferences

\_\_\_\_\_

\_\_\_\_\_

Who Gets What? Gifts of property, finances

People \_\_\_\_\_

\_\_\_\_\_

Charity/Church \_\_\_\_\_

\_\_\_\_\_

Contact Our Community Foundation  
at 812 698 5413 to learn more about  
benefits of leaving  
a charitable legacy  
in your estate plan.





# Estate Plan Tool