Jon Miller Law

TRUSTED LEGAL PLANNING

The Essential Estate Planning Checklist

Creating an estate plan isn't just about paperwork — it's about peace of mind. This checklist will help you see what you already have in place and what might still need attention. Take five minutes to mark what's done and note what's missing — then let's talk about making it official.

Step 1: Core Estate Planning Documents

You should consider ensuring your wishes are protected. These core documents below dictate how your assets are handled, who makes decisions on your behalf, and how your loved ones are cared for if something happens to you.

☐	**Last Will & Testament**	Ensures your assets and guardianship wishes are legally documented.
☐	**Revocable Living Trust** (if applicable)	Helps avoid probate and simplifies asset distribution.
☐	**Durable Power of Attorney**	Appoints someone to manage financial affairs if you're incapacitated.
☐	**Healthcare Power of Attorney**	Designates someone to make medical decisions on your behalf.
☐	**Living Will / Advance Directive**	States your healthcare preferences (life support, organ donation, etc.).
☐	**HIPAA Authorization**	Allows loved ones to access medical records if needed.

Step 2: Organizing Your Financial & Legal Information

One of the best things you can do is to make life easier for your loved ones by keeping your financial and legal details in order, ensuring a smooth transition, avoiding legal headaches, and preventing unnecessary delays or disputes.

☐	**List of Assets & Liabilities**	Bank accounts, real estate, investments, debts, etc.
☐	**Beneficiary Designations**	Review & update on retirement accounts, life insurance, etc.
☐	**Digital Assets**	Secure passwords, social media accounts, and online banking.
☐	**Safe Storage**	Keep original documents in a safe, fireproof location and provide copies to trusted individuals.
☐	**Business Succession Plan** (if applicable)	What happens to your business if you are gone?

Step 3: Family & Emergency Preparedness

Planning isn't just about finances—it's about peace of mind. From emergency contacts to medical care instructions, having a preparedness plan means your family knows exactly what to do when the unexpected happens.

☐	**Emergency Contact List**	Trusted family members, doctors, attorneys, financial advisors.
☐	**Medical & Insurance Information**	Have current health insurance, long-term care, and life insurance policies accessible.
☐	**Letter to Loved Ones**	Consider writing final letters to express wishes and guidance.
☐	**Funeral & Burial Preferences**	Outline plans to reduce stress on loved ones.
☐	**Disaster Preparedness**	Ensure an emergency kit, extra cash, and key documents are in place.

Step 4: Review & Update Regularly

Estate plans aren't 'set and forget.' As life changes, so should your estate plan. Regular reviews ensure your plan stays up to date with new laws, financial changes, and family needs.

☐	**Annual Check-In**	Revisit your estate plan every few years or after major life events.
☐	**Keep Trusted People Informed**	Make sure executors, trustees, and family members know where to find key documents.

Need Help?

Estate planning doesn't have to be complicated. Whether you're starting from scratch or updating an old plan, I'll help you make sense of the details and protect what matters most — your family.

Schedule a Free Consultation

Looking forward to working with you,

Jon Miller
J G Miller Law, PLLC

P.S. ***This checklist isn't legal advice—it's just really good advice.*** To make it official, you'll want to work with an attorney (like me!) to ensure your estate plan meets your needs and follows the law. No internet checklist can replace real legal guidance, but hey, you're already ahead of the game just by reading this!