PATHFINDER
WEALTH CONSULTING

Estate Planning Checklist

Estate Planning Documents

- [ ] Create an inventory of all of your assets: Include home, vehicles, jewelry, artwork, physical assets, retirement/bank/investment accounts, and all financial documents
- [ ] Work with a professional to draft “Big 4” Documents including:
    - Last Will & Testament
    - Living Will
    - Healthcare Power of Attorney
    - Durable (Financial) Power of Attorney

Estate Planning To-Do Items

- [ ] Confirm that your bank, retirement and other investment accounts are titled appropriately and have beneficiaries named to match your estate planning documents
- [ ] Pre-pay burial/funeral expenses if possible. Prepayment may save money as you can specify the details of your service and avoid future price increases
- [ ] Consider Charitable giving: if you are charitably inclined, remember to document your wishes through your estate plan
- [ ] Communicate your wishes: Make sure your loved ones know that you have a financial plan, what your wishes are, and where the documents are kept
- [ ] Review your estate plan every few years, or at a minimum, when you experience big life events

Together, our expert team will walk you through a comprehensive process for managing your financial life and creating a long-term plan customized for you. Get started today at pathfinderwc.com