

# **ESTATE PLANNING CHECKLIST**

## **PLANNING FOR INCAPACITY:**

- Power of Attorney for Finances
- Revocable Living Trust
- Advance Directive
- Declaration for Mental Health Treatment
- Nomination of Guardian and Conservator
- Long-Term Care Planning

## **PLANNING FOR DEATH:**

- Will
- Revocable Living Trust
- Testamentary Trust for Minors or Adults Who Need Help with Management
- Testamentary Trust for Estate Tax Planning
- Special Needs Trust for Disabled Person Receiving Public Benefits
- Beneficiary Designations
- Joint Ownership
- Funeral Plans and Burial Instructions