
ESTATE PLANNING

Estate Planning Checklist

The essential building blocks of a coordinated estate plan — and the pieces families most often miss.

InheritGuard Partners

Coordination. Collaboration. Continuity.

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CORE DOCUMENTS

- Last will and testament, current and signed
- Revocable living trust (where appropriate)
- Durable financial power of attorney
- Healthcare power of attorney / proxy
- Living will / advance healthcare directive

BENEFICIARIES

- Primary and contingent beneficiaries named on all accounts
- Beneficiaries reviewed after major life events
- No minors named directly without a trust structure
- Beneficiary designations consistent with your will and trust

ASSET TITLING & FUNDING

- Real estate titled consistently with the plan
- Trust funded with the intended assets
- Bank and investment accounts correctly titled
- Digital assets and passwords documented

REVIEW & MAINTENANCE

- Plan reviewed within the last 3 years
- Executor and trustee selections confirmed
- Family informed of where documents are kept

Next Step — Take the Estate Score™

See where your estate plan may have coordination gaps. Visit ericrodriguez.co/assessment.

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