PENNIX LAW
Forging solutions for your future.

Estate Planning Checklist

A practical guide to help you gather information, organize decisions, and prepare for a focused conversation.

Key People and Decisions

■ Who should serve as executor or trustee?	■ Who should make financial decisions if you cannot?
■ Who should make healthcare decisions if you cannot?	■ Do you need guardians named for minor children?
■ Who should receive specific assets or sentimental items?	■ Are there any family dynamics or concerns to plan around?

Documents and Information to Gather

■ Government-issued ID and basic contact information	■ Existing wills, trusts, powers of attorney, or directives
■ List of bank, retirement, and investment accounts	■ Real estate deeds, mortgage details, and property addresses
■ Life insurance policies and beneficiary designations	■ Business ownership documents or partnership records

Planning Topics to Discuss

■ Will versus trust considerations	■ Beneficiary updates that may be needed
■ Healthcare wishes and end-of-life preferences	■ How to handle digital accounts and passwords
■ How to keep important information organized for loved ones	■ Whether probate avoidance strategies make sense

These materials are educational starting points and not a substitute for legal advice tailored to your situation.

Need help applying this to your family or business? Schedule a consultation with Pennix Law.