

Estate planning checklist

- Create a list of all physical assets.
- Create a list of all non-physical assets.
- Create a list of all debts.
- Review your retirement plans.
- Choose an executor.
- Write a will.
- Set up a trust (if needed).
- Take out a life insurance policy.
- Create an advanced medical directive.
- Appoint power of attorney.
- Check that all paperwork is legally binding.
- Find a safe place to keep your will
- Tell your spouse or a close friend or family member where it is.