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.