

Estate Planning Document Checklist

NAME: _____

DATE: _____

- ☐ Copy of your present Will.
- ☐ Copies of deeds to all real estate in which you own an interest.
- ☐ All insurance policies owned by you together with those policies on your life which are owned by others.
- ☐ Copies of all documents relating to pension, profit sharing, deferred compensation and other employee benefit plans.
- ☐ Copies of all buy-sell or stock transfer restriction agreements to which you are a party.
- ☐ Copies of all Trust Agreements of which you are a beneficiary.
- ☐ Copies of all Trust Agreements executed by you.
- ☐ Copies of all Powers of Attorney executed by you.
- ☐ Copies of all divorce decrees and any modifications thereof.
- ☐ Copies of all pre-nuptial or post-nuptial agreements.
- ☐ Copies of all gift tax returns previously filed by you.
- ☐ Copies of last three years Income Tax Returns, including depreciation schedules.
- ☐ Copies of all mortgages on your real estate.