Your estate planning checklist

Start with a rough list and the questions on your mind. Check off prompts you have considered; skip anything that does not apply. No perfect answers needed.

01 The people you want to plan for

Start with the people, then work toward the paperwork.

- [ ] **Make a short list of your people.**
  Think about a spouse or partner, children, other dependents, and anyone else you want to provide for.
- [ ] **If you have minor children, consider guardian nominations.**
  Think about a first choice and a backup to discuss with us. Skip this prompt if it does not apply.
- [ ] **Flag anything that needs a closer conversation.**
  For example: a blended family, an unmarried partner, a beneficiary with support needs, or a family disagreement.

02 The people who could step in

Different roles can be filled by different people.

- [ ] **Consider an executor and a backup.**
  Who would you trust to handle the work of your estate? Note questions about their availability and willingness.
- [ ] **Consider someone for financial decisions.**
  Who could help with money and property matters if authorized? Think about a backup, too.
- [ ] **Consider a health care agent and a backup.**
  Think about who understands your wishes and could speak up for them. Plan to discuss the role with that person.

03 A broad picture of what you own

A rough inventory is enough for this first pass.

- [ ] **List your main asset categories.**
  Include a home, accounts, retirement savings, life insurance, business interests, and meaningful digital assets.
- [ ] **Note how assets are owned, where known.**
  Flag joint ownership, existing trusts, beneficiary designations, and property outside New York. No account numbers needed.
- [ ] **Note debts or obligations that may affect the plan.**
  Think about mortgages, loans, guarantees, support obligations, and any other questions to bring to us.

Names, priorities, or questions for your own notes

Preparation only, not legal advice or an estate planning document. Do not include passwords, Social Security numbers, or full account numbers.

Turn questions into a conversation.

Find what already exists, note what matters now, and get clear on the work and cost before moving ahead. These prompts help you prepare, not choose a legal strategy.

04 The documents you already have

Find what exists before deciding what needs to change.

- [ ] **Locate any existing planning documents.**
  Look for wills, trusts, financial powers of attorney, health care proxies, and living wills. Note where originals are kept.
- [ ] **Locate beneficiary and ownership information.**
  Find recent beneficiary confirmations and, if relevant, deeds or business agreements. Ask us how to share them securely.
- [ ] **Make a note of changes since the last plan.**
  Examples include marriage, divorce, a new child, a move, a death, a health change, or buying a home.

05 What you want your plan to do

You can bring questions instead of final decisions.

- [ ] **Write down your top two or three priorities.**
  For example: providing for children, choosing decision-makers, or making your wishes easier for family to follow.
- [ ] **Think about who should receive what, and when.**
  Note specific gifts, charities, pets, or concerns about someone receiving assets all at once. We will explain the options with you.
- [ ] **Think about your care preferences and values.**
  Note what you want to discuss with your health care agent and health care providers. You do not need to solve every scenario now.

06 Questions for the first conversation

Get clear on the work and the cost before moving ahead.

- [ ] **Confirm the scope and fee with us.**
  Which documents, meetings, and revisions are included? What might cost extra? Bring the budget you want to discuss.
- [ ] **Discuss the next steps with us.**
  Clarify signing arrangements and, if a trust is recommended, who handles funding work and whether it is included.
- [ ] **Plan future reviews with us.**
  Discuss storage, who should have copies, when to review it, and how later updates are handled.

The questions you most want answered

Preparation only, not legal advice or an estate planning document. Do not include passwords, Social Security numbers, or full account numbers.