

FREE ESTATE PLANNING CHECKLIST

What to consider and store
with your Will

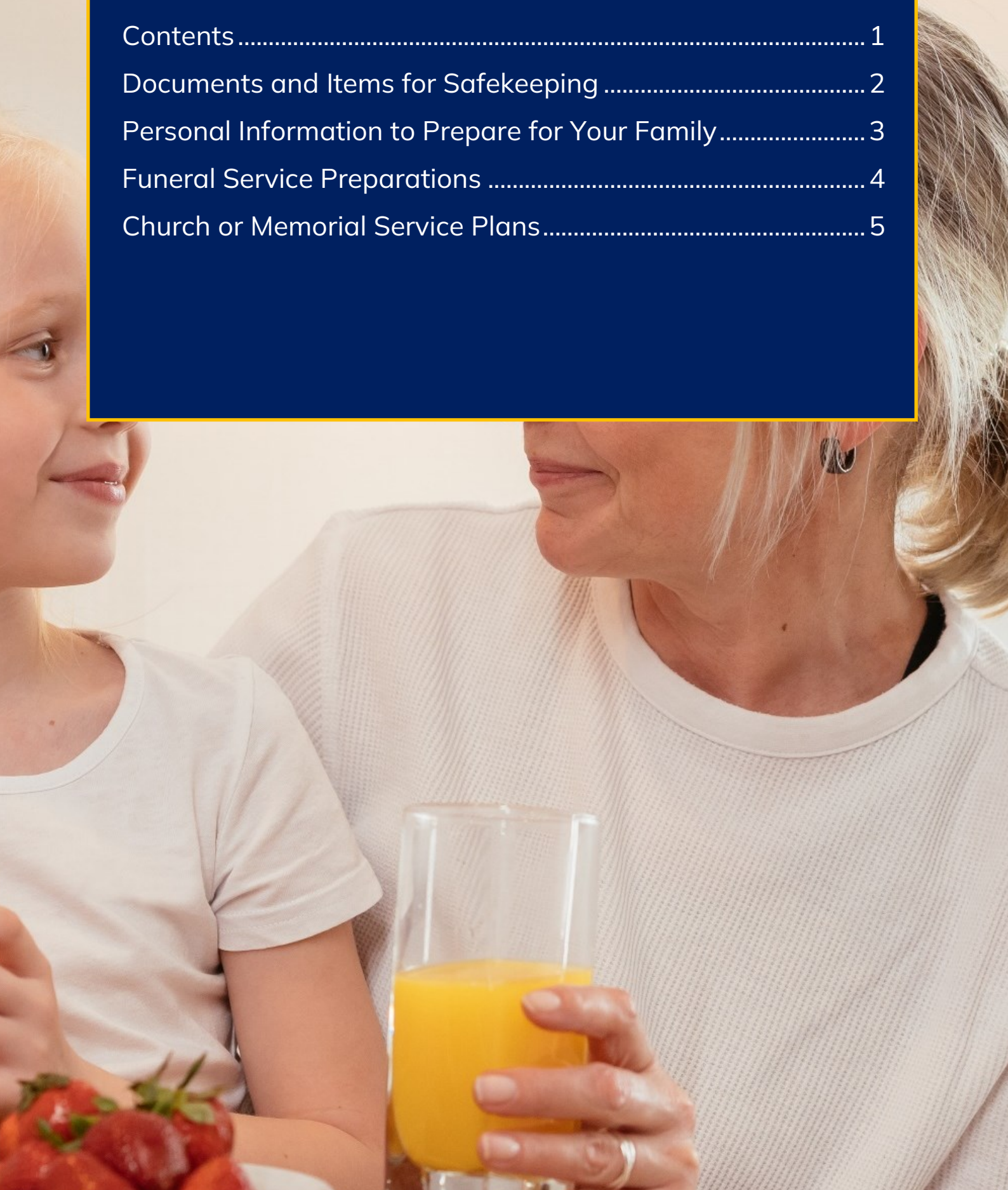


Safe to do
business with

Code Compliant

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Documents and Items for Safekeeping

- All deeds and titles
- Automobile records, titles and registrations
- Bank account information
- Benefits from any fraternal, veteran or union organizations
- Birth certificate
- Citizenship papers
- Credit card information
- Deed to cemetery plot
- Insurance papers
- Marriage certificate
- Mortgages and notes
- Safe deposit box location and key
- Social Security benefits information
- Tax records
- Veteran discharge papers

Personal Information to Prepare for Your Family

- Information regarding your Will (for your executor(s))
- Names of any health and welfare power of attorney(s)
- Names of accountant, stockbroker or banker
- Information about any real estate, stocks or bonds
- Plans for any pets

A photograph of an elderly couple with white hair and glasses, looking down at a smartphone held by the man. They are in a room with white horizontal blinds in the background.

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Funeral Service Preparations

Pre-Planning or At Time Of Death

- Select funeral home
- Select casket or urn
- Select pallbearers
- Select flowers and music
- Arrange transportation
- Select clothing/jewellery
- Select which newspapers to notify
- Choose a family viewing or a visitation
- Select where to send memorial contributions
- Arrange reception (location and food)
- List family and friends to notify

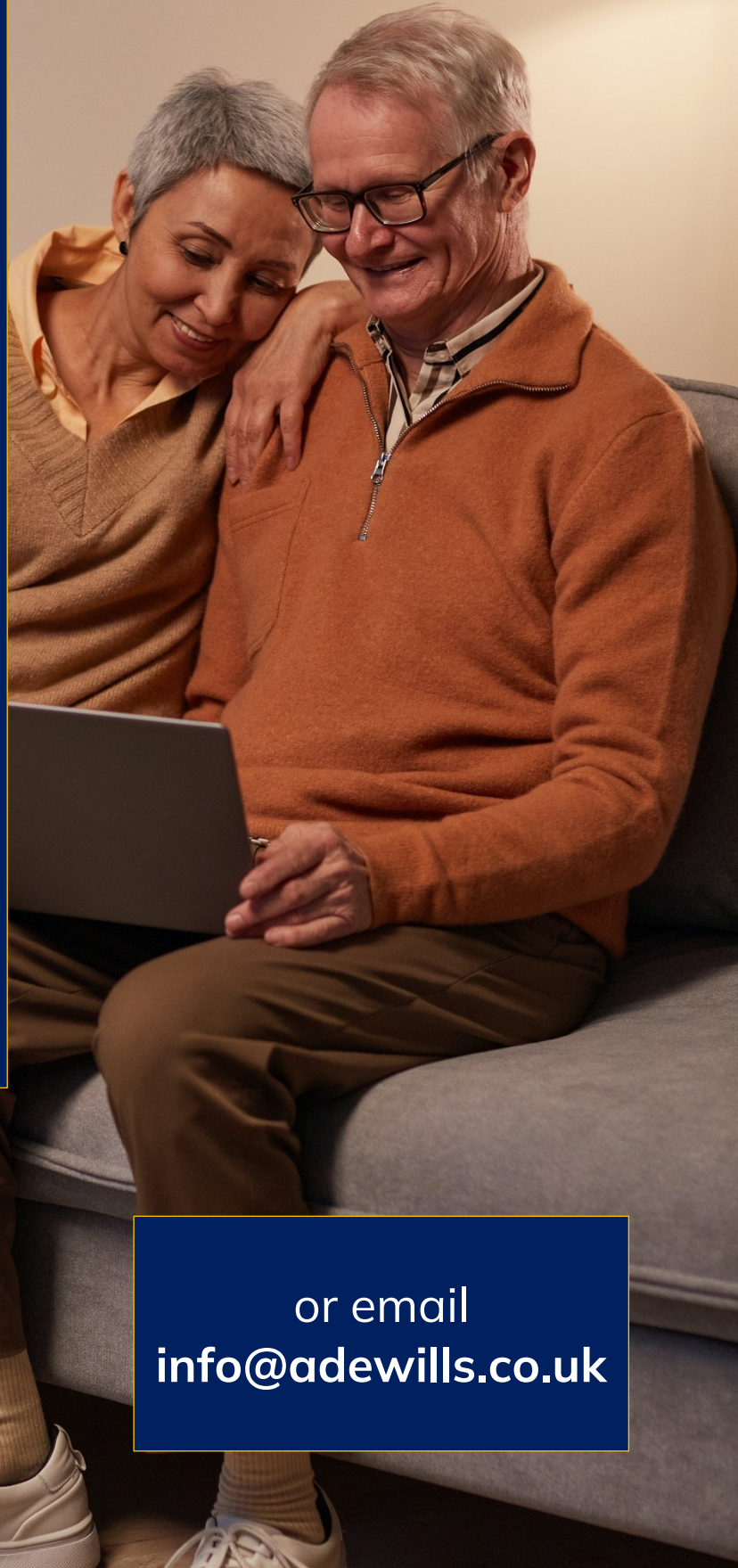
Pre-Planning or At Time Of Death

- Prepare death certificate
- Prepare information for obituary (family history, education, professional history, activities, etc.)



Church or Memorial Service Plans

- Location of a church or memorial service
- Select clergy
- Name any family or friends that should deliver eulogy or participate in service
- Select scripture or literature to read
- Select photographs to display
- Burial Preparations
- Select cemetery plot
- Select grave marker and inscription



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01865 507174

or email
info@adewills.co.uk