

Needs Checklist

NAME	
DATE	

YOUR ESTATE	
☐ Home	
☐ Personal Property	
☐ Annuities	
☐ Life Insurance	
☐ Pension Plans	
☐ IRAs	
☐ 401Ks	
☐ Stocks, Bonds MF or CDs	
☐ Business	
☐ Other	

BENEFICIARIES	
BENEFICIARIES	DATE OF BIRTH
SPECIAL BEQUESTS	

TO DO LIST	
☐ Choose 3-4 Successor Trustees	
☐ Choose 3-4 people Healthcare POA	
☐ Get the APNs for each property	
☐ Make a rough list of your assets	
☐ Choose 3-4 guardians for minors	
☐	
☐	
☐	
☐	
☐	

PEOPLE IN CHARGE	
SUCCESSOR TRUSTEES	
HEALTHCARE POWER OF ATTORNEY	
GUARDIANS FOR MINOR CHILDREN	