

## ESTATE PLAN CHECKLIST

<input type="checkbox"/>	Review your estate planning documents and any relevant tax law changes with your estate planning attorney.
<input type="checkbox"/>	Confirm that your Will has been signed, is stored in a fireproof location and your executor knows where to find the original.
<input type="checkbox"/>	Review your digital accounts and passwords and make sure a trusted contact (spouse, partner, assistant, etc.) knows how to access and can share with your Executor if you are not here.
<input type="checkbox"/>	Consult your financial advisors to discuss overall Investment Strategy. Have your investment goals or income needs changed?
<input type="checkbox"/>	Contact your insurance advisor to review your life insurance policy performance and longevity. A formal review may be recommended in light of current circumstances, tax law, and carrier financial performance.
<input type="checkbox"/>	Verify beneficiary designations on retirement plan accounts, annuities, life insurance policies, etc.
<input type="checkbox"/>	Examine asset ownership to confirm assets are titled correctly (especially if assets have been transferred to revocable trusts or are part of other planning strategies).
<input type="checkbox"/>	Compile a contact list for key roles in your estate plan - executors, attorneys, accountants, financial advisors, executives, shareholders, beneficiaries and other interested parties.
<input type="checkbox"/>	Draft a Letter of Instruction to guide your executor and trustee. How would you like the resources of the trust to be utilized or distributed in the future?
<input type="checkbox"/>	Write a Legacy Letter to family members to share your values, blessings, and life lessons. What is the main purpose of the trust? What values or stories would you like to share in connection with your gifts?
<input type="checkbox"/>	Perform a "fire drill" exercise to confirm interested parties know how to access documents and set in motion important estate procedures. Think of two scenarios- one is disability, one is post-death.
<input type="checkbox"/>	Meet with the Pendleton Square team to understand the value of an independent trustee, build a family relationship, and document your plans and wishes. How can Pendleton Square best ensure that your plans are known and carried out?