Lawyers for Families

GJESDAHLLAW

Estate Planning Checklist

Inventory Your Assets

- [ ] Home
- [ ] Other Real Property
- [ ] Vehicles
  (cars, motorcycles, boats etc.)
- [ ] Collectables
  (antiques, family heirlooms, items with special meaning, etc.)
- [ ] Other valuable assets
- [ ] Checking Accounts
- [ ] Savings Accounts
- [ ] Retirement Accounts
- [ ] Life Insurance
- [ ] Stocks, Bonds, CDs
- [ ] Mutual Funds
- [ ] Farm/Business Equity

Prepare Essential Documents

- [ ] Last Will and Testament
- [ ] Healthcare Directive
- [ ] Durable Power of Attorney
- [ ] Trusts
- [ ] Beneficiary Designations
- [ ] Life Estate Deeds
- [ ] HIPAA Release
- [ ] Business Succession Plan
- [ ] Life Insurance
- [ ] Prenuptial/Postnuptial Agreement

Notes

1375 21st Avenue North
Fargo, ND 58102
Phone: 701.237.3009
gjesdahllaw.com