

CHECKLIST



To protect and control the financial future of your family and loved ones, keep track of your progress on creating important estate planning documents.

Important Estate Planning Tasks

- ☐ **Will**
- ☐ **Power of Attorney**
- ☐ **Beneficiary Designations**
- ☐ **Living Will**
- ☐ **Living Trust**
- ☐ **Health Care Proxy**