

Estate Planning Checklist **Single Estate Planner**

From: Lambert & Lambert PLC

PERSONAL AND CONFIDENTIAL
Subject to Attorney-Client Privilege

The following is a checklist of information and items that will be needed to plan your Estate and prepare your Estate Plan documents.

1. A copy of your latest Will or Trust (if you have either)
2. Personal Information
 - A. Your name as it should appear on the documents (e.g., middle name or no)
 - B. Your address
 - C. Your SS # and DOB
 - D. Your Driver's license #
3. Beneficiaries
 - A. Primary
 - B. Any successor beneficiaries (include multiple levels of priority)
 - C. Any charitable beneficiaries, with amount or formula
4. Trustees
 - A. You will be the first Trustee for your Trust
 - B. First Successor Trustee
 - C. Second Successor Trustee (not required)
 - D. You may name more than one Trustee at any level of successorship
 - E. Please provide address (at least City and State) for all Successor Trustees

5. Personal Representatives - Will
 - A. Your Personal Representative
 - B. You should name at least one successor Personal Representative
 - i. You may name multiple successor Personal Representatives
 - C. Provide address (at least City/State) for all successor Personal Representatives

6. Real estate holdings
 - A. Provide copy of deeds
 - B. In the alternative, provide addresses or property descriptions

7. Bank and Investment Accounts
 - A. Provide the last statement of each account
 - B. In the alternative, provide identifying information for each account
 - C. Do you own any property or accounts outside MI?

8. Identify any pension or employee retirement benefits

9. Special Will designations
 - A. Any special organ or body part donations
 - i. For science or donation only?
 - B. Any personal requests for funeral, cremation, burial, other
 - C. Do you want a clause prohibiting Will contests?

10. Patient Advocate form
 - A. Name Patient Advocate
 - B. Name successor or successors
 - C. Do you have any special instructions?
 - D. General instructions for life support
 - E. Do you spend significant time in other states?
(May need similar form for those states)
 - F. Provide addresses (at least City/State)

11. Durable Power of Attorney
 - A. Designate Attorney-in-Fact
 - B. Designate Successor Attorney-in-Fact (recommended)
 - C. Provide addresses (at least City/State)

12. Any other Planning needs or interests you would like to identify at this time

This Checklist covers only basic information and is not designed to be comprehensive. Your particular concerns will be addressed in consultation with the Estate Planner. Once you have completed this form, contact the professionals at Lambert & Lambert PLC to prepare your Estate Plan.