

Estate Planning for Retirees



What will happen to your home and assets if you're no longer here?

No one wants to think about death, but it's important to properly prepare in case the unthinkable happens. Without a will, health directives, and other vital documents your family will not be prepared if the worst were to happen, and you will have no control over the division of your assets or legacy.

Estate Planning Checklist

These are a few of the documents that you should have in place to ensure your family is protected and your final wishes are carried out.

<input type="checkbox"/> Last Will and Testament or Trust		<input type="checkbox"/> Proof of Identity	
<input type="checkbox"/> Executor of Your Estate		<input type="checkbox"/> Social Security Card	<input type="checkbox"/> Marriage License
<input type="checkbox"/> Beneficiaries of Your Estate		<input type="checkbox"/> Driver's License	<input type="checkbox"/> Divorce Decree
<input type="checkbox"/> Guardians for Minor Children		<input type="checkbox"/> Birth Certificate	<input type="checkbox"/> Passport
<input type="checkbox"/> Beneficiaries for		<input type="checkbox"/> Home Ownership	
<input type="checkbox"/> Bank Accounts	<input type="checkbox"/> Stock	<input type="checkbox"/> Title	<input type="checkbox"/> Mortgage Papers
<input type="checkbox"/> 401Ks/IRAs	<input type="checkbox"/> Investments	<input type="checkbox"/> Property Deeds	
<input type="checkbox"/> Life Insurance Policies	<input type="checkbox"/> Financial Accounts	<input type="checkbox"/> Funeral Plan (service wishes, cremation and burial preferences, etc.)	
<input type="checkbox"/> Pensions	<input type="checkbox"/> Emails	<input type="checkbox"/> Make sure loved ones know where to find all important documents.	
<input type="checkbox"/> Healthcare Directives (end-of-life instructions)		<input type="checkbox"/> Power of Attorney	

For assistance with estate planning or for questions reach out to:

Chad Fuss, Esq - (503) 908-5457 - chad@pnwtrusts.com