

# Estate Planning Checklist



Wealth preservation and protection are central components of our practice.



*Plan for a Lasting Legacy*

**Estate planning is a crucial process for wealth preservation and protection. By developing a comprehensive plan, you can ensure that your loved ones are provided for and your wishes honored. But, we recognize that the process can be daunting. To help you get started, here is a checklist of important items to consider when creating an estate plan:**

1. **Last Will and Testament:** Draft a legally binding will that clearly outlines your assets and distribution priorities.
2. **Designate beneficiaries:** You should name beneficiaries for your retirement accounts, life insurance policies, and other accounts to ensure that your assets go to the right people.
3. **Trusts:** Consider establishing a trust to manage and protect assets for your benefit and that of your loved ones.
4. **Healthcare Directives:** Prepare advance healthcare directives, including living will and durable power of attorney for healthcare, to specify medical treatment and surrogate preferences.
5. **Guardianship Designations:** If you have minor children, designate a legal guardian who will take care of them in the event of your incapacity or demise.

6. **Review your plan regularly:** Estate planning is not a one-time event. You should review your plan regularly and make updates as necessary to ensure that it reflects your current wishes and circumstances.
7. **Consult with Professionals:** Proper estate planning requires professional guidance in legal, tax, and financial matters.

By following this checklist, and working with our skilled professionals, you can create a comprehensive estate plan that protects your assets, provides peace of mind, and preserves your legacy. Contact us to get started.

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## About DGIM Law

*Law Evolved.*

Our mission is to provide our clients with effective and efficient business law counsel and solutions.

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