



**CHECKLIST**  
**DEPOT**



**PREMIER**  
INSURANCE CONTRACTS INC.

## ESTATE PLANNING CHECKLIST

Hello,

My name is Al Castellanos and I am a licensed Insurance agent associated with the Checklist Depot. Do you know why checklists are important to have? Well I am here to give you that information. Checklists can help us stay more organized by assuring we don't skip any steps in a process. Seeing a list of what you must get done, instead of trying to remember it all, is going to save you a ton of time.

**Estate Planning Checklist** is an important list to have. What is estate planning? Estate planning is the process of anticipating and arranging, during a person's life, for the management and disposal of that person's estate during the person's life and after death, while minimizing gift, estate, generation skipping transfer, and income tax.

### **Things to Know and Have for Estate Planning:**

#### ***General Information***

- Gather all your personal information
  - Personal details
  - Family details
  - Current advisory team
  - Goal and expectations
- Assess your financial situation
  - Assets
  - Liabilities
  - Life Insurance Policies
  - Other Insurance Coverage
  - Income
  - Expenses
- Review your current documents
  - Will
  - Trust documents
  - Power of attorneys
  - Medical directives

- Insurance policies
- Buy-sell agreements
- Deeds, leases, mortgages, and land contracts
- Guardian nominations
- Separation/divorce agreements
- Tax returns
- Make sure to have your funeral arrangements made

These and many more tips may help you prepared to plan your estate, please check out the complete checklist and other important checklist at our website <https://www.prinsuco.com/Checklist.62.htm>.

If you have any questions regarding this checklist or any of the other checklist, please contact me at (281) 642-4082 or at [alcastellanos@prinsuco.com](mailto:alcastellanos@prinsuco.com).