# Estate Planning Checklist

We hope you find this complimentary 'Estate Planning Checklist' from the experienced legal professionals at Sandoval Legacy Group helpful. It has been meticulously designed to provide you and your family with a comprehensive overview of the essential steps involved in effective estate planning and elder law preparation. As you navigate through these guidelines, you'll gain insights into how best to organize your legal and financial affairs, ensuring nothing is overlooked. Estate planning is not just about preparing for the future; it's about securing peace of mind for yourself and your loved ones by making informed decisions today.

Please note that this checklist is intended for informational purposes only and does not constitute legal advice. While we strive to keep this information up-to-date and accurate, the Sandoval Legacy Group does not guarantee the completeness or applicability of the content in specific circumstances. Laws and regulations governing estate planning and elder law are complex and subject to change. Therefore, this checklist should serve as a starting point for your estate planning process.

We strongly recommend consulting with a qualified attorney at Sandoval Legacy Group who specializes in estate planning and elder law to discuss your specific situation. An attorney can provide you with personalized advice tailored to your unique needs and help ensure that your estate plan complies with current laws and regulations. This personalized consultation is crucial as it helps protect your assets and secures your legacy according to your specific wishes and the requirements of the law.

By using this checklist, you acknowledge that there is no attorney-client relationship between you and the Sandoval Legacy Group until a formal engagement is made. Remember, proper estate planning is a critical step towards safeguarding your future and that of your family. Do not hesitate to reach out to our team for expert guidance and to address any questions or concerns you might have about the estate planning process.

**Schedule your free initial consultation today.**

## Personal Information and Documents

**1. Gather Personal Information:**
Full legal names and addresses for all family members, List of current advisors (financial, legal, medical)

**2. Compile Essential Documents:**
Birth and marriage certificates, Divorce decrees or separation agreements, Current and past estate planning documents (wills, trusts)

## Financial Overview

**3. Document Financial Assets:**
Bank accounts, investment accounts, Retirement accounts (IRA, 401(k), pensions), Life insurance policies and annuities

**4. Review Real Estate Holdings:**
Primary residence and other real property, Deeds, mortgage details, and equity status

## Legal Instruments

**5. Update or Create a Will:**
Designate an executor/executrix, Specify beneficiaries and any special instructions

**6. Establish Trusts if Applicable:**
Decide on types of trusts (revocable, irrevocable, special needs), Appoint trustees

**7. Designate Powers of Attorney:**
Financial power of attorney, Healthcare power of attorney

**8. Prepare Advance Health Care Directives:**
Living wills, DNR orders (Do Not Resuscitate)

**Special Considerations**

**9. Plan for Minor or Special Needs Dependents:**
Guardianship details, Special needs trusts

**10. Business Succession Planning:**
Structure for transition of ownership, Roles for family members in business operations

**Review with an Elder Law Attorney**

**11. Consult with a Professional:**
Schedule a review with an elder law attorney to ensure all aspects of your estate plan are aligned with current laws and your personal circumstances.

**Digital Assets**

**12. Manage Digital Footprint:**
List of all digital assets (social media accounts, online banking, digital wallets), Instructions for access and management after your passing

## Ready to Secure Your Legacy?

Take the first step towards peace of mind by scheduling your personalized consultation today. Our expert attorneys at Sandoval Legacy Group are here to help you navigate every aspect of estate planning with ease.

Call us now at **(888) 599 – 4066** or email us at **info@sandovallegacygroup.com** to schedule your free initial consultation.

Protect what matters most—plan with Sandoval Legacy Group.

---

*This comprehensive checklist, tailored for Southern Californians, is designed to be a thorough starting point for discussions with your estate planning attorney at Sandoval Legacy Group, ensuring no detail is overlooked in your estate and elder law planning.*