

# Estate Planning Checklist

Dear [Name],

As you prepare your estate planning documents, please ensure you have the following items completed:

- Last Will and Testament
- Power of Attorney
- Healthcare Proxy
- Living Will
- Beneficiary Designations
- Trust Documents (if applicable)
- List of Assets and Liabilities
- Funeral Arrangements
- Digital Assets and Passwords

Once you have gathered and prepared these documents, please contact our office for further assistance.

Sincerely,  
[Your Name]  
[Your Title]  
[Your Contact Information]