

Estate Planning Checklist

Dear [Client's Name],

As we begin the process of your estate planning, please consider the following checklist to ensure that we cover all necessary aspects:

- Identify your assets and liabilities
- Decide on beneficiaries for your assets
- Choose an executor for your estate
- Establish a Power of Attorney
- Consider a Healthcare Proxy
- Review and update your will
- Consider setting up a trust
- Discuss tax implications
- Record your wishes for funeral and burial
- Review current insurance policies

Please gather any relevant documents and feel free to reach out if you have any questions.

Best regards,

[Your Name]

[Your Title]

[Your Contact Information]