

Estate Planning Checklist

Your Essential Guide

Use this checklist to review your estate planning arrangements. Tick each item you have in place, and speak to us about anything that needs attention. A free initial consultation is always available.

1

YOUR WILL

- ☐ Do you have a valid, up-to-date Will?
- ☐ Does your Will reflect your current wishes?
- ☐ Have you appointed Executors who are willing and able to act?
- ☐ Have you considered guardians for children under 18?
- ☐ Have you reviewed your Will after major life events (marriage, divorce, birth of a child)?
- ☐ Is your Will stored safely and do your Executors know where it is?

2

LASTING POWERS OF ATTORNEY

- ☐ Do you have an LPA for Property & Financial Affairs?
- ☐ Do you have an LPA for Health & Welfare?
- ☐ Have your chosen attorneys agreed to act?
- ☐ Have you appointed replacement attorneys?
- ☐ Have you considered any specific instructions or preferences?
- ☐ Are your LPAs registered with the Office of the Public Guardian?

3

PROTECTING YOUR ASSETS

- ☐ Have you considered how your assets will be distributed?
- ☐ Are you aware of potential Inheritance Tax liabilities?
- ☐ Have you considered a Trust to protect assets for beneficiaries?
- ☐ Have you reviewed your pension and life insurance nominations?
- ☐ Are jointly-owned properties held in the right way (joint tenants vs tenants in common)?

4

PREPARING FOR PROBATE

- ☐ Have you made a list of all your assets and liabilities?
- ☐ Do your family know where important documents are kept?
- ☐ Have you considered funeral wishes and pre-paid plans?
- ☐ Are digital accounts and passwords stored securely?

Need help? Contact Safe Harbour Legal

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*This checklist is for general guidance only and does not constitute legal advice.
For personalised advice, please book a free consultation.*

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