



From: McManus Blog Archives

Estate Planning Must Dos

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Estate Planning is just that, a plan which should be created during a time in your life when you have the ability to complete all the *estate planning documents* and ensure your family understands them. Most often estate plans are considered during death, but they can also help your family if you are incapacitated and not able to care for them while you are still alive. Either way, the list below is a great way to get back on track with your estate planning needs.

Estate Planning: 16 Things To Do Before You Die

Must Do No. 1: Physical Items Inventory

Must Do No. 2: Non-Physical Items Inventory

Must Do No. 3: Credit Cards & Debts List

Must Do No. 4: Organization & Charitable Memberships List

Must Do No. 5: Send a Copy of your Assets List to Your Estate Administrator

Must Do No. 6: Review IRA, 401(k) and Other Retirement Accounts

Must Do No. 7: Update Life Insurance & Annuities

Must Do No. 8: Assign TOD Designations

Must Do No. 9: Select a Responsible Estate Administrator

Must Do No. 10: Create a Will

Must Do No. 11: Review & Update Your Documents

Must Do No. 12: Send Copies of Your Will to Your Estate Administrator

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<http://www.mcmanusestateplanning.com>

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Must Do No. 13: Visit a Financial Planner or Estate Attorney

Must Do No. 14: Initiate Important Estate Plan Documents

Must Do No. 15: Simplify Your Life

Must Do No. 16: Take Advantage of College Funding Accounts

[Read the details](#)

(investopedia.com)

Estate Planning

Estate Planning Must Dos will help you get started for the financial future of your family. The peace of mind your family deserves shouldn't be rushed like your taxes on the 14th of April. Take the time needed to properly prepare your assets and personal effects

to ensure the things you loved and want to be passed on to your family the way you imaged.

This is a simple **estate planning** list and is a good starting point to understanding what is needed to create your own estate plan. Come join us for a Free estate planning workshop to get your questions answered and learn from an expert in estate planning in a casual environment.