

End-of-Year Estate Planning Checklist

A simple guide to help Idahoans review key documents, discuss important decisions, and prepare their estate plans before the new year.

Estate Documents

- ☐ Review will
- ☐ Review trust and ensure assets are correctly titled
- ☐ Confirm guardians for minor children
- ☐ Review executor and trustee roles

Health & Medical

- ☐ Review healthcare directive and living will
- ☐ Confirm healthcare power of attorney
- ☐ Share medical preferences

Financial

- ☐ Review beneficiary designations
- ☐ Update financial power of attorney
- ☐ Inventory new assets
- ☐ Update access to digital accounts

Property & Real Estate

- ☐ Add/remove Idaho homes, land, rentals, or cabins
- ☐ Review deed titling structure
- ☐ Add property to trust if applicable
- ☐ Verify who inherits your property

For Unmarried or Nontraditional Co-Owners

- ☐ Confirm deed type
- ☐ Clarify survivorship intentions
- ☐ Add co-owned property to will/trust
- ☐ Create or update co-ownership agreements
- ☐ Discuss long-term occupancy and buyout plans

Business Owners

- ☐ Review your Operating/Partnership Agreement
- ☐ Update business valuation
- ☐ Review or create a buy-sell agreement
- ☐ Add business interests to your estate plan
- ☐ Confirm business succession
- ☐ Review insurance policies

💬 WHAT TO COMMUNICATE WITH LOVED ONES

- ☐ Share where documents are stored
- ☐ Discuss long-term care wishes
- ☐ Review blended-family considerations
- ☐ Make a list of questions for your attorney

