



Harvey & Driggs
ATTORNEYS AT LAW

ESTATE PLANNING

checklist

Aside from the estate planning documents prepared for you, we also suggest the following:

- Ensure beneficiaries are up-to-date
 - Retirement Accounts
 - Life Insurance Policies
- Add a Payable-on-Death (POD) or Transfer-on-Death (TOD) designation where applicable
 - DMV for all titled vehicles
 - Bank Accounts
- Digital Asset Planning: create a master list that identifies and locates your online accounts and digital assets. This is a link to a great template to use: <http://www.digitalpassing.com/digital-audit/>
- Maintain an updated list of all debts & liabilities
- Gather and store important documents in one secure location - make sure someone trusted knows where to locate and access them

*contact us for any
updates to your
documents*

804-348-0862

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