

Checkpoint Contents

Estate Planning Library

PPC's Estate & Trust Library

Practical Estate Planning

Chapter 16 Reviewing Wills, Trusts, and Other Documents

Appendix 16B List of Estate Planning Documents to Consider

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## **Appendix 16B**

### **List of Estate Planning Documents to Consider**

1. Last Will and Testament
  
2. Revocable Living Trust with Pourover Will
  
3. Durable Power of Attorney
  
4. Health Care Power of Attorney
  
5. Living Will (Directive to Physicians)
  
6. Testamentary Letter
  
7. Premarital and Unmarried Partner Agreements
  
8. Memorandum Disposing of Personal Property
  
9. Beneficiary Designations (e.g., life insurance policies, retirement plans)

10. Review of signature cards on joint accounts (e.g., tenants in common, joint tenancy with or without a right of survivorship, etc.)
11. Irrevocable Life Insurance Trust
12. Irrevocable Trust for benefit of minors
13. Irrevocable Trust for support of parents or adult children 605 of *PPC's Guide to Uses and Taxation of Trusts*
14. Split-interest trust for charitable giving (charitable lead or charitable remainder trust) 703 and 704
15. Private Foundation
16. Personal Residence Grantor Retained Income Trust (GRIT)
17. Grantor Retained Annuity Trust (GRAT)
18. Grantor Retained Unitrust (GRUT)
19. Family Limited Partnership
20. Guardianship Appointment
21. Buy/Sell Agreements

22. Marital Deduction Trust

23. Organ Donation Form

24. Retirement Plan Documents

25. Life Insurance Policies

26. Prior Year Gift Tax Returns

27. Loan Documents (e.g., jointly liable, separate liability, community debt)

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