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SUPPLEMENTAL ESTATE PLANNING CHECKLIST

1. Set up pay on death instructions for your accounts. If you and a spouse are joint account holders, then you want to add pay on death instructions for when both of you are deceased.
2. For any items of personal property you want to give to specific people, create a document and name it "Personal Property Memorandum to Will" and list each item and the name of the person to whom you want it bequeathed. Place this document with your will.
3. Make a list of your online accounts and the passwords for each account and place this list with your will. Tell your legal representatives you have done this so they can locate this document in the event you are incapacitated and they need to access one or more of your online accounts. Do the same for any cell phones so your legal representatives can open the cell phones and access important information.
4. Please review your power of attorney to make sure it is a general durable power of attorney that includes HIPPA (Health Insurance Portability and Accountability Act) powers granting specific persons permission to speak with and give directions to doctors and hospital staff about your medical care and provide access to your medical records. It also should include guardianship appointment preferences for who would act as guardian(s) if needed.
5. Make funeral arrangements in advance and pre-pay for the funerals and burials.
6. Make a living will, if you don't already have one. A living will provides instructions about the use of life-sustaining measures in the event of a terminal illness or a permanent comatose or vegetative state. It says what you want done and what you don't want done. Consider preparing a letter to your children stating your wishes should you need to be removed from life support.
7. Prepare a list of your assets and accounts and where they are located. This should include titles to automobiles and recent statements for your financial accounts. Include contact information for any persons you regularly deal with at your financial institutions.

8. Make a list of all insurance policies, noting their cash values and death benefits. Be sure that any life insurance policies pay to identifiable persons or to your trust and not to your or Alice's estate.
9. Make a list all liabilities, including lines of credit, credit cards or other debt, with account numbers and contact information for payments.
10. Prepare a list of the location and contents of any safe deposit boxes or safes together with access codes or numbers.