ESTATE PLANNING DOCUMENT CHECKLIST

Arranging for the orderly disposal of your estate to eliminate uncertainties over administration and probate is the focus of estate planning. Working with a financial professional can help to reduce income taxes and other costs associated with probate, so that your heirs will receive the full amount you intended to leave them.

Use this checklist as a guide to the type of documents you need to gather and upload to your MyWealth Records SideDrawer application. To assist with the scanning and upload of documents, be sure to download the SideDrawer mobile app available for Android and iOS.

RECORD TYPE: PLANS AND WISHES

- ☐ Scan of any Letters you would like to leave to family and friends
- ☐ Upload a copy of the Gifting Inventory document available in Resources
- ☐ Upload a copy of the Memorandum of Wishes document available in Resources

RECORD TYPE: LAST WILL AND TESTAMENT

- ☐ Scan of your current Last Will and Testament

RECORD TYPE: POWER OF ATTORNEY

- ☐ Scan of your Power of Attorney

RECORD TYPE: HEALTH CARE DIRECTIVE

- ☐ Scan of your Health Care Directive,
- ☐ Scan of your Personal Directive or Living Will

RECORD TYPE: TRUST DOCUMENTS

- ☐ Scan of any Trust Documents you may have