

"Estate Planning Essentials for Millennials & Gen Z"

Personal Information

- ☐ Full legal name
- ☐ Date of birth
- ☐ Social Security number
- ☐ Contact information

Financial Assets

- ☐ Bank accounts
- ☐ Retirement accounts (e.g., 401(k), IRA)
- ☐ Investment portfolios
- ☐ Real estate properties

Digital Assets

- ☐ Email accounts
- ☐ Social media profiles
- ☐ Online subscriptions
- ☐ Cryptocurrency holdings

Legal Documents

- ☐ Last Will and Testament
- ☐ Durable Power of Attorney
- ☐ Healthcare Proxy
- ☐ Living Will

Beneficiaries

- ☐ Designated beneficiaries for accounts
- ☐ Contingent beneficiaries

Guardianship

- ☐ Appointed guardian for dependents
- ☐ Instructions for pet care

Funeral Preferences

- ☐ Burial or cremation wishes
- ☐ Preferred funeral arrangements

Storage of Documents

- ☐ Secure location for physical documents
- ☐ Digital backups with secure access