

Affairs-in-Order Checklist

A general starting point for reducing the burden on your loved ones. Not legal advice — consult licensed professionals for wills and legal planning.

Work through the essentials:

Important documents gathered in one clearly labeled place

Wishes written down in plain language

At least one trusted person knows where things are

A current list of key accounts and contacts exists

Consulted a licensed attorney and advisor for the legal and financial pieces

Set a yearly date to review and update everything

The single biggest gap right now:

One step I'll take this week to close it:

One professional I'll contact for the legal or financial pieces: