

# ESTATE PLANNING READINESS CHECKLIST



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# ESTATE PLANNING READINESS CHECKLIST

**ESTATE PLANNING IS ONE OF THE MOST  
THOUGHTFUL AND LOVING STEPS YOU CAN TAKE  
FOR THE PEOPLE WHO MATTER MOST TO YOU.**

It provides peace during difficult moments, protects the life you've built, and ensures your wishes are honored when you can no longer speak for yourself. Yet for many people, estate planning feels overwhelming or easy to postpone because it's hard to know where to begin.

The Estate Planning Readiness Checklist is designed to simplify the process. This practical tool helps you take stock of what you already have in place, identify important gaps, and understand what actions may still be needed. Whether you're creating an estate plan for the first time or reviewing an existing one, this checklist offers a clear, organized way to move forward with confidence. By completing it, you're not just checking boxes, you're taking an important step toward peace of mind, security, and care for your loved ones.





# HOW READY ARE YOU TO PROTECT YOUR FUTURE?

Fill out this quick form to see how prepared you are today for the future you want to protect.

## 1. PERSONAL & FAMILY INFORMATION

- I have an up-to-date list of all immediate family members.
- I have documented key personal details (full legal names, DOB, SSNs where appropriate).
- I have identified who depends on me financially or personally.

**IF NO:** *Consider creating a personal information summary for your estate binder.*

## 2. ASSET & LIABILITY ORGANIZATION

- I have a complete inventory of my assets (bank accounts, investments, property, insurance, etc.).
- I know where all titles, deeds, and important financial documents are located.
- I have a list of my debts or liabilities and who to contact about them.
- My digital assets (passwords, subscriptions, crypto, online accounts) are documented and accessible.

**IF NO:** *Start a master inventory spreadsheet and store it securely.*

### 3. WILL & BASIC LEGAL DOCUMENTS

- I have a legally valid and up-to-date will.
- My will clearly outlines how I want my assets distributed.
- My chosen executor knows their role and is willing to serve.
- I have reviewed my will within the last 3–5 years (or after major life changes).

**IF NO:** *Contact an estate planning attorney to begin or update your documents.*

### 4. INCAPACITATION PLANNING

- I have a Financial Power of Attorney appointed.
- I have a Medical Power of Attorney appointed.
- I have an advance healthcare directive or living will in place.
- My HIPAA release forms allow trusted people to access medical information.
- My chosen agents understand my preferences and responsibilities.

**IF NO:** *These documents are essential for protecting your wishes while you're alive.*

### 5. BENEFICIARY DESIGNATIONS

- My retirement accounts have updated beneficiary designations.
- My life insurance policies have named primary and contingent beneficiaries.
- I have reviewed beneficiaries for all accounts within the past 12 months.
- My beneficiary choices align with my will (no conflicts or accidental disinheritance).

**IF NO:** *Outdated beneficiary forms override wills—update ASAP.*

### 6. TRUSTS (IF APPLICABLE)

- I understand whether a trust could benefit my estate or family.
- Any existing trusts are fully funded.
- My trustees are informed, updated, and willing to serve.
- I've reviewed my trust documents within the last 3–5 years.

**IF NO:** *Unfunded or outdated trusts may not achieve your intended goals.*

### 7. TAX AWARENESS & PLANNING

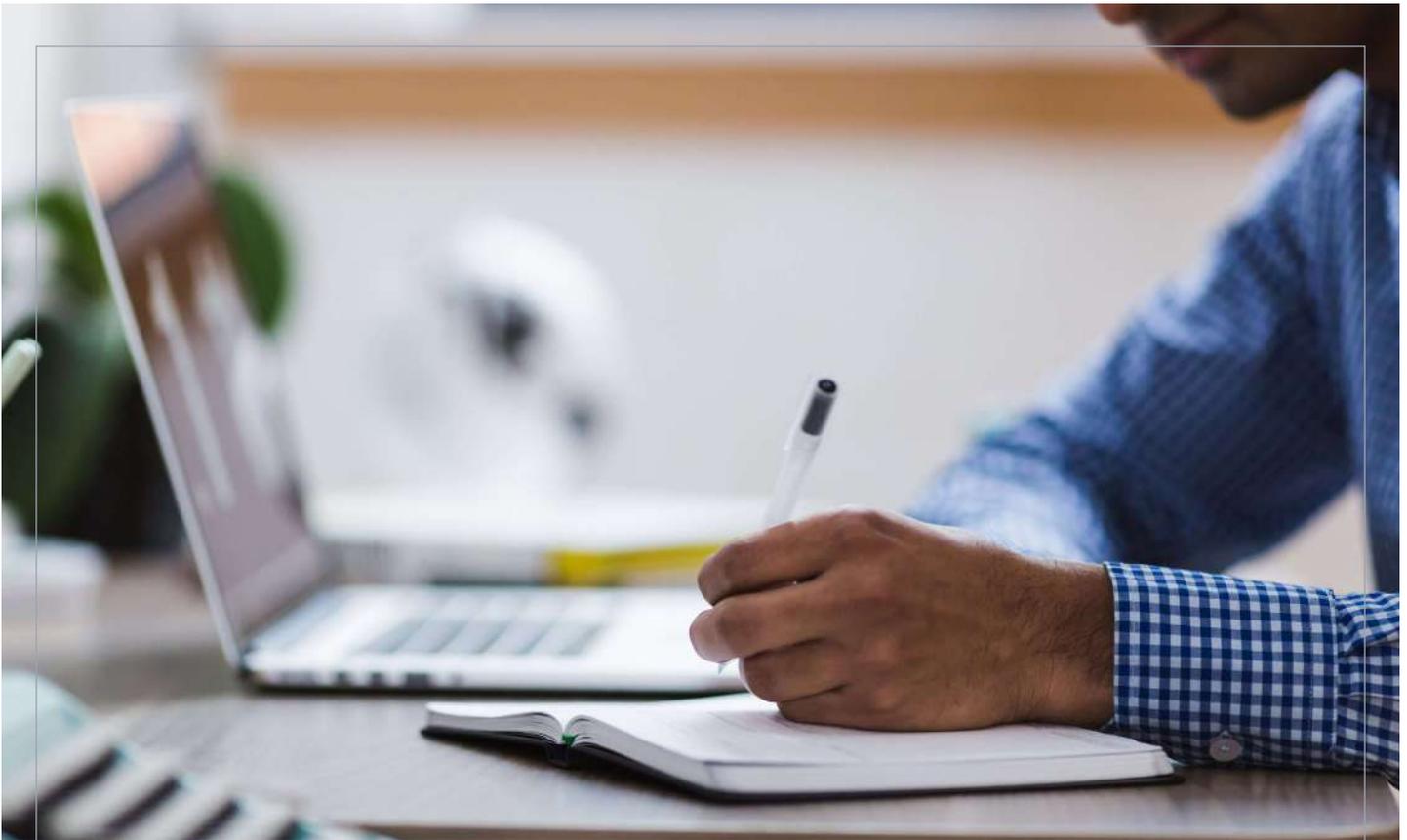
- I understand whether my estate may be subject to estate taxes.
- I have strategies in place to minimize estate, gift, or capital gains tax exposure.
- I have met with a financial or tax professional for guidance.

**IF NO:** *Tax laws change constantly. Reviewing annually or biannually is wise.*

### 8. LONG-TERM CARE & SPECIAL CONSIDERATIONS

- I have considered how long-term care expenses might be funded.
- I have plans in place for dependents or loved ones with special needs.
- I have explored Medicaid planning if relevant to my situation.

**IF NO:** *Early planning preserves more options and reduces financial strain.*



## 9. DOCUMENT STORAGE & ACCESSIBILITY

- All my estate planning documents are stored in a secure, fireproof location.
- A trusted person knows where my documents are and how to access them.
- I have digital backups (if appropriate) of important files.

**IF NO:** *Organization ensures your plan works when it's needed most.*

## 10. COMMUNICATION & PEACE OF MIND

- I have communicated my wishes to key family members or decision-makers.
- I feel confident that my estate plan reflects my current life and values.
- I have scheduled regular reviews—every 3–5 years or after major life changes.

**IF NO:** *Updating and communicating your plan prevents confusion and conflict.*

## YOUR ESTATE PLANNING READINESS SCORE

Count your number of check marks:

**20 to 25:** Excellent! Your estate plan is strong and well-maintained. Congratulations!

**14 to 19:** Good foundation! Just a few key areas need attention. Speak with an estate planning professional to polish up your plan.

**8 to 13:** Important pieces are missing; consider updating your plan or meeting with an advisor.

**0 to 7:** Alert! Start building your estate plan immediately to protect yourself and your loved ones.



## GET CLEAR DIRECTION

At Strittmatter, we understand that estate planning can feel complex, emotional, and deeply personal. You don't have to navigate it alone. Our role is to help you turn clarity into action by answering your questions, coordinating with trusted professionals, and ensuring your plan reflects what matters most to you.

Whether you're just getting started or refining an existing plan, we're here to guide you with care, expertise, and a long-term commitment to your peace of mind. When you're ready to take the next step, Strittmatter is here to help you move forward with confidence.



### **REQUEST A COMPLIMENTARY ESTATE PLANNING DISCOVERY MEETING**

Confused about your portfolio or asset allocation options? We offer a confidential, no-strings-attached complimentary discovery meeting to review your current financial position and options to help meet your future goals and objectives.

**[CLICK HERE TO CHOOSE YOUR TIME >](#)**

# PROTECT YOUR FAMILY & KEEP CONTROL OF YOUR ASSETS

## WE'RE HERE TO HELP

At Strittmatter Wealth, we're here to support you every step of the way. Whether you have questions, need guidance, or want help turning insights into action, our team is committed to helping you move forward with clarity, confidence, and peace of mind.

If you need help navigating next steps, please know you don't have to do it alone. Reach out today, and let us walk beside you during this important process.

## FROM THE MOMENT YOU BECOME A CLIENT, WE PUT YOU FIRST

Your goals, your family, and your future come first. With thoughtful, generational planning and trusted fiduciary guidance, you can feel confident that every financial decision supports the life you want today and the legacy you dream of for tomorrow.

## SIMPLE, TRANSPARENT FEES

Unlike other planners, we don't earn commissions on trades or by selling investment products. Instead, we use a transparent fee schedule based on your portfolio size. This is so that you know our interests are aligned with yours. We do better when you do better.

## CUSTOMIZED INVESTMENT APPROACH

Your estate plan should be custom-fit to your unique situation and goals. That's why we take the time to get to know you, your finances, your family, and lifestyle. As your needs and the markets shift over time, we adapt your strategy to keep investments safe and stay on track.

## DEDICATED SERVICE

As a client, you'll get dedicated support to help you stay on track to your goals. We update you on your portfolio and market changes, even when volatility is high. You'll also receive resources on Social Security, Medicare, tax strategies, and more.

## ABOUT SWMG

Our family office has been serving clients since 2007. As one of the leading independent wealth management groups in the nation, we are a fee-based firm specializing retirement planning, estate planning, investment management, and more.

# HOW DOES STRITTMATTER WEALTH COMPARE TO OTHERS?

## HOW WE COMPARE TO OTHER FINANCIAL PLANNERS:

	STRITTMATTER WEALTH	OTHER FINANCIAL PLANNERS
Fiduciary: always putting clients first	✓	?
Simple, transparent management fees	✓	?
Comprehensive estate planning	✓	?
Portfolio customized to your goals and lifestyle	✓	?

## OUR CLIENTS COME FIRST IN ALL THAT WE DO

We put your goals, your family, and your future at the heart of everything we do, guiding your financial journey with decades of experience and unmatched client service.

We take the time to truly listen and understand what you want out of life, for yourself and for your family. We believe that a successful financial plan starts with looking at the whole picture, and then putting the right financial pieces in place to work for you.

AT STRITTMATTER, **YOU** *matter.*



## KEEP THE EDUCATION GOING:

Click on one of the options below to continue learning and making progress towards achieving your financial goals:

- › **BROWSE MORE EDUCATIONAL RESOURCES**
- › **SUBSCRIBE TO OUR FINANCIAL NEWSLETTERS**
- › **SCHEDULE A COMPLIMENTARY DISCOVERY MEETING**



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