Diocese of St. Petersburg - Office of Stewardship and Development

LIFE PLANNING CHECK LIST

The following checklist is to assist you in your life planning:

___ I have contacted an attorney, licensed in Florida, to develop and/or review my estate plan.

___ My accountant has checked my plan for any tax implications.

WILL

___ I have a valid and current Florida will or a valid will that was executed properly in another state. If I am unsure of the validity of a will executed in another state, I will have a Florida attorney review it.

___ If minor children are involved, the will or trust identifies who is to care for them, physically, financially and spiritually.

___ The personal representative [executor], trustees if needed, and other advisors have been chosen, meet the requirements of Florida law and are willing to serve.

___ The will includes a memo, listing whom I wish to receive specific personal items, or I have another list that is incorporated into my will by reference.

___ I have met with my personal representative and discussed all elements of my will and the location of all my important documents.

LIVING WILL

___ I have a living will executed according to Florida Law.

___ I have met with my personal representative, my physician, my family and any appointed agents to discuss my living will.

___ Three people who are not my agents have a copy of my living will.

HEALTH CARE SURROGACY

___ I have a valid Florida Designation of Health Care Surrogate.

___ I have chosen my health care surrogate(s), made him, her, or them aware of my wishes and they have accepted this responsibility.

FINANCIAL/PERSONAL ISSUES

___ I have established a durable power of attorney for financial matters that appoints an attorney in fact who will handle my financial affairs even if I become incapacitated. I may have an alternate if advisable by my attorney.

___ I have informed all family members and/or my personal representative of the location for the following:

- Checkbooks and bank statements.
- Cancelled checks when applicable.
- Savings accounts and certificates of deposits.
- Insurance policies, names-address-phone number of agents and how to collect the proceeds.
- For residence and other properties, location of deeds and mortgage information.
- Marriage and birth certificates.
- Veteran's Administration papers.
- Arrangements to be made for pension benefits.
- Social Security earnings statement.

___ I have made certain that appropriate individuals have access to ALL of my accounts, investments and safe deposit boxes. If there are questions, you may want to see your attorney.

___ I have given my personal representative the names and phone numbers of my pastor, accountant and attorney.

___ If there is a business ownership, I have informed the affected parties of my decisions on the business that are included in my will and made proper arrangements with my attorney.

___ The beneficiaries on my insurance policies, retirement plans and annuities are current.

___ I have informed my family and/or personal representative of my wishes concerning funeral arrangements, cremation, any religious ceremonies and my final resting place.

Trusts (if applicable)

___ I have reviewed all trust documents and have made sure that they are up to date with the current law. If you have not, or are unsure, please see your attorney.

___ I have fully funded my Trust

___ My will is coordinated with my trust [a pour-over will). If not please see your attorney.

___ I have a successor trustee(s).