



STEWART LAW

Estate Planning Preparation Checklist

A practical guide to organizing your goals, documents, and questions before an estate planning consultation in Florida.

Use this as a preparation guide. You do not need every answer before meeting with an attorney. Check what you have gathered, considered, or decided does not apply, and bring the checklist to your consultation.

Before you begin

This checklist is general information, not individualized legal advice or a substitute for an estate plan. Do not put account numbers, Social Security numbers, passwords, or detailed medical information on this copy.

Name: _____ Consultation date: _____

Main questions or concerns: _____

1. Personal and family

Start with the people your plan should protect and the goals you want to discuss.

- ☐ Write down the main goals you want your estate plan to accomplish.
- ☐ List your spouse or partner, children, and anyone else you want to provide for.
- ☐ Note any minor children, blended-family concerns, or loved ones who need ongoing support.
- ☐ Identify recent marriages, divorces, births, deaths, or moves.
- ☐ Consider whether anyone should receive a particular item or gift.
- ☐ Gather copies of any prior estate planning documents you already have.

2. Property and accounts

A general inventory helps your attorney see how property is held and how it may pass.

- ☐ List real estate you own in Florida and in other states.
- ☐ Note how each property is titled and whether it has a mortgage.
- ☐ List bank, brokerage, retirement, and insurance accounts by type.
- ☐ Note business interests, significant personal property, and digital assets.
- ☐ Identify jointly owned property and any property held in an existing trust.
- ☐ Flag major debts, guarantees, or obligations you want to discuss.
- ☐ If relevant, note NFA firearms or other property needing specialized planning.

3. Will and guardianship

These are decisions to discuss with your attorney, not instructions to draft or sign a will yourself.

- ☐ Consider whom you would trust to serve as personal representative, and a backup.
- ☐ Think about who should receive your property and what should happen if that person dies first.
- ☐ If you have minor children, consider possible guardians and alternates.
- ☐ Note any family circumstances that make equal shares or immediate distributions a concern.
- ☐ Write down questions you have about probate or how a will works with other documents.

4. Trust planning

A trust may or may not fit your goals. If you already have one, its funding deserves review.

- ☐ List reasons you are considering a trust, such as privacy, management, or probate planning.
- ☐ Consider a successor trustee and an alternate.
- ☐ Think about when and how beneficiaries should receive trust property.
- ☐ If you already have a trust, note which major assets are titled in it.
- ☐ Bring questions about coordinating a trust with your will and beneficiary forms.

5. Financial decision makers

Think about who could handle financial and legal matters if you were unable to act.

- ☐ Consider a trusted person to act under a durable power of attorney.
- ☐ Choose a possible alternate in case your first choice is unavailable.
- ☐ Consider any limits, concerns, or special instructions you want to discuss.
- ☐ Locate any existing power of attorney for attorney review.
- ☐ Ask how your agent would find the document when needed.

6. Health care wishes

A conversation with the people you trust can be as useful as gathering the paperwork.

- ☐ Consider a health care surrogate and an alternate.
- ☐ Write down questions about your treatment preferences and a living will.
- ☐ Consider who should receive copies of your health care documents.
- ☐ Locate any existing surrogate designation or living will.
- ☐ Think about how to discuss your wishes with your chosen decision makers.

7. Florida home and deeds

Your home deserves a separate conversation because its title and your family situation matter.

- ☐ Locate the current deed for each property you want to discuss.
- ☐ Note whether your Florida home is your primary residence.
- ☐ Identify whom you hope would receive the home after your death.
- ☐ If relevant, ask whether a Lady Bird deed fits your broader plan.
- ☐ Discuss any planned sale, refinance, move, or ownership change before changing a deed.

8. Beneficiary designations

Bring current forms or a list of where to find them. Your attorney can help coordinate them with the rest of your plan.

- ☐ Find the current beneficiaries on life insurance policies.
- ☐ Find the current beneficiaries on retirement accounts.
- ☐ Check any payable-on-death or transfer-on-death account instructions.
- ☐ Note outdated names, missing alternates, or changes in family circumstances.
- ☐ Ask how these designations should coordinate with a will or trust.

9. Documents and next steps

You do not need to solve every issue first. Bring your questions to the consultation.

- ☐ Gather existing wills, trusts, powers of attorney, health care documents, and deeds.
- ☐ Make a list of questions about fees, timing, signing, and any later follow through.
- ☐ Consider where signed originals could be stored and who should know their location.
- ☐ Think about when to review your plan after future life or asset changes.
- ☐ Bring this checklist, even if some items remain open.

Next step: Bring this checklist even if some items remain open. Stewart Law can help you decide what belongs in your plan after reviewing your circumstances.