



Checklist for preparing your executor

With an estate plan in place, you'd think the work would be over. But preparing your executor is the final nail in the estate-planning coffin.

Use this checklist to make sure that your executor is on board with your plans.

Checklist

- I have a legally valid will.
- I have reviewed my will with my executor and answered questions and explained rationales.
- My executor knows where the will is kept and has access.
- My executor is granted full leeway in hiring professionals to help in carrying out my wishes and that is reflected in my will.
- All of my records in regard to finances, property and investments are up to date and well organized and the executor of my estate has access to them.
- I gave the executor the names and phone numbers of my CPA, banker, lawyer and any other financial advisers.
- The executor knows how I want to be buried and has it in writing.
- The executor is aware of my wishes regarding organ donation and the organizations to which I would like them donated.