Estate planning: 10-step checklist

This worksheet provides you with a 10-step checklist for estate planning. With this sheet as a guide, your advisor will work through each step with you to help make your estate plan complete. Use this checklist as a first step towards building a plan to ensure your estate is distributed the way you wish.

		To do	Pending	Completed	Notes
1	Consult and retain appropriate professionals	❑	❑	❑	
2	Draw up a household balance sheet	❑	❑	❑	
3	Understand your life insurance needs	❑	❑	❑	
4	Draw up your Will	❑	❑	❑	
5	Establish power of attorney for property	❑	❑	❑	
6	Establish power of attorney for personal care	❑	❑	❑	
7	Minimize taxes and administration fees	❑	❑	❑	
8	Keep track of accounts and important information	❑	❑	❑	
9	Communicate your plans	❑	❑	❑	
10	Review and update regularly	❑	❑	❑	

For more information on the estate planning process, please see our Tax & Estate InfoPage, *Estate planning*: *10 simple steps*. Additionally, you can contact your advisor, call us at **1.800.874.6275** or visit our website at **www.invesco.ca**.

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