



**ENTERPRISE TRUST**  
A LIDO COMPANY

# Checklist for Mom

Talking about estate plans today prevents confusion tomorrow. This checklist offers a framework for families who want to approach these conversations with confidence, respect, and structure. Gathering the essential information to steward their legacy and the contact information for the professionals who should be involved helps protect their wishes, and supports the family's long-term stability.

| Topic                                        | Questions to Ask                                                                                                                                | Information to Gather:<br>Details / Contacts |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Care Preferences    | Have we made financial arrangements to secure your preferred living situation, caregiver preferences, to ensure quality of life in later years. |                                              |
| <input type="checkbox"/> Estate Documents    | Do you have a current will and trust? When were they last updated? Who prepared them?                                                           |                                              |
| <input type="checkbox"/> Executor / Trustee  | Who is named as executor or trustee? Is that person still appropriate? Have you considered a professional or corporate trustee for continuity?  |                                              |
| <input type="checkbox"/> Financial Accounts  | Where are your bank and investment accounts held? Are account numbers, institutions, and online logins documented?                              |                                              |
| <input type="checkbox"/> Retirement Accounts | Do you have IRAs, 401(k)s, or defined benefit plans? Who manages them?                                                                          |                                              |

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| Topic                                                      | Questions to Ask                                                                                          | Information to Gather:<br>Details / Contacts |
|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Professional Advisor Coordination | Please introduce me to your key professionals. Are they authorized to communicate with me if needed?      |                                              |
|                                                            | <input type="checkbox"/> Attorney                                                                         |                                              |
|                                                            | <input type="checkbox"/> CPA                                                                              |                                              |
|                                                            | <input type="checkbox"/> Wealth Advisor                                                                   |                                              |
|                                                            | <input type="checkbox"/> Banker                                                                           |                                              |
| <input type="checkbox"/> Real Estate                       | Is the primary residence titled in a trust? Are all properties properly titled and insured?               |                                              |
| <input type="checkbox"/> Insurance Policies                | Do you have life insurance? Long-term care insurance? Where are the policies stored and who is the agent? |                                              |
| <input type="checkbox"/> Business Interests                | Do you still have ownership in any of the businesses? Is there a succession plan in place?                |                                              |
| <input type="checkbox"/> Liabilities                       | Any outstanding debts, mortgages, or lines of credit to be settled?                                       |                                              |

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|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Philanthropy                         | Are there charitable commitments, pledges, or foundations? How do you want future giving to be handled? |                                              |
| <input type="checkbox"/> Personal Property                    | Are there heirlooms, jewelry, or sentimental items designated for specific individuals?                 |                                              |
| <input type="checkbox"/> Access & Storage                     | Where are original documents kept (safe deposit box, home safe, attorney's office)? Who has access?     |                                              |
| <input type="checkbox"/> Digital Passwords                    | What online assets do you have? What are the passwords? Who has access?                                 |                                              |
| <input type="checkbox"/> Power of Attorney (POA)              | Do you have a durable power of attorney? Who is named? Are copies stored securely?                      |                                              |
| <input type="checkbox"/> Healthcare Proxy / Advance Directive | Who is your healthcare proxy or agent? Where are those documents kept?                                  |                                              |
| <input type="checkbox"/> Final Wishes                         | What are your preferences for funeral, burial, or celebration of life?                                  |                                              |
| <input type="checkbox"/> Legacy Letter                        | What do you hope for for your legacy. How do want to be remembered.                                     |                                              |

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