MacLaren Law LLC

Estate Planning Checklist

Use this checklist to get organized for estate planning.

- Draft and execute your documents in accordance with Ohio requirements.
- Fund your trust (if applicable), retitle assets, update beneficiary designations, and store documents in a safe place.
- Review and update your estate plan every 3-5 years or after major life events (marriage/divorce, birth of a child, change in assets/business, move to another state).
- Inform your loved ones where key documents are located and what your wishes are, while preserving appropriate confidentiality.
- If you own or are planning a business (which many of our clients at MacLaren Law do), coordinate your business succession plan with your personal estate plan.
- Take inventory of your assets (real estate, bank & investment accounts, retirement, business interests, personal property) and liabilities.
- Define your goals: Who do you want to provide for? At what age or stage? Do you have special needs, children from prior marriages, or charitable goals?
- Choose your key decision-makers: executor, trustee, guardian, healthcare agent, and financial agent.
- Decide whether you'll use just a will, a trust, or a combination.
- Work with a qualified estate-planning attorney (especially in Ohio, since state law is specific).