

# 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
<b>1</b>	Consult and retain appropriate professionals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>2</b>	Draw up a household balance sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>3</b>	Determine your life insurance needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>4</b>	Draw up your Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>5</b>	Establish power of attorney for property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>6</b>	Establish power of attorney for personal care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>7</b>	Minimize taxes and administration fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>8</b>	Keep track of accounts and important information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>9</b>	Communicate your plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>10</b>	Review and update regularly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

For more information on the estate planning process, please see our *Tax & Estate InfoPage* titled *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**.