IOWA PUBLIC RADIO
NEWS | CLASSICAL | STUDIO ONE

Planning Checklist

We all understand the importance of planning. It gives us the ability and opportunity to provide for our loved ones as well as the causes we care about, like Iowa Public Radio. By taking the time to carefully plan what to do with our assets, we can pass along the values that have guided us throughout our lifetime.

How do I start an Estate Plan?

Use this checklist to help you get organized:

- ❑ Make a list of everything you own – such as real estate, bank and investment accounts, personal collections, jewelry, cars and boats. Nothing is too trivial!
- ❑ Decide who will receive things on that list – your family members, other loved ones and the causes important to you.
- ❑ If you have minor children, choose a qualified guardian to look after them and name that person in your will.
- ❑ Depending on whether you have a will or trust, choose your executor or successor trustee. This person will be responsible for seeing that the terms of your will or living trust are carried out as you intended.
- ❑ Execute powers of attorney that name the person(s) who will make healthcare and financial decisions for you if you become incapacitated.
- ❑ Importantly, consult an attorney specialized in estate planning who will create (or advise you in creating) a will or living trust, as well as any other necessary documents pertaining to your estate.