



# Estate Planning Head Start

## Get your documents in order

- Locate and organize legal documents
- Gather birth certificates, Social Security cards, and disability documentation
- Compile insurance policies and note beneficiary designations
- Locate deeds, titles, and financial account information

## Review your beneficiaries

- Check beneficiary designations on life insurance policies.
- Review retirement accounts (IRA, 401k) - these pass outside a will
- Confirm no assets are designated directly to a person with a disability, if they rely on means-tested benefits
- Update outdated designations (ex-spouses, deceased relatives)

## Think through guardianship

- Identify who would serve as guardian for your child if you could not.
- Identify a backup (successor) guardian.
- Have an informal conversation with those people about your wishes.

## Start your Letter of Intent

- Document daily routines, preferences, and communication style.
- List current doctors, therapists, medications, and programs.
- Write down your hopes and expectations for your child's future.

**These are tasks you can do today, even before hiring an attorney, to help prepare your family and your loved ones.**

**Ready to take the next step? Contact us to schedule a consultation.**

