

Task List — Estate Plan Completion Checklist

Matter: Estate of Henderson — Estate Planning and Trust Package | Sensitivity: INTERNAL | Allowed roles: partner, attorney, paralegal, legal assistant, support staff

Checklist

- 1) Conflicts cleared.
- 2) Draft will and trust.
- 3) Draft POA and healthcare directive.
- 4) Review with client.
- 5) Schedule execution.
- 6) Confirm asset titling and beneficiary designations.
- 7) Deliver final binder and digital copies.