

Task List — Estate Plan Completion Checklist

Matter: Estate of Henderson — Estate Planning and Trust Package | Sensitivity: INTERNAL | Allowed roles: partner

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.