



Estate Plan Checklist



OLDMUTUAL

Initial Stage

- ☐ Gather personal information (name, age, marital status, dependents).
- ☐ List all assets and liabilities.
- ☐ Identify beneficiaries.
- ☐ Consider your wishes for asset distribution and guardianship.

Creating Documents

- ☐ Draft your will.
- ☐ Set up any necessary trusts.
- ☐ Prepare power of attorney documents.
- ☐ Create a living will.

Review and Update

- ☐ Regularly review your documents (annually or after major life events)
- ☐ Update beneficiaries as needed.
- ☐ Ensure all documents are properly signed and witnessed.

Final Steps

- ☐ Store your documents in a safe place.
- ☐ Inform your executor and loved ones where to find your documents.
- ☐ Keep a copy with a trusted person or legal adviser.