

ELEMENTS OF AN ESTATE PLAN TO CONSIDER:

- Will** – Prepare a document naming Beneficiaries and Personal Representatives

- Advance Directive (or Living Will)** – Fill out state-provided form that describes your end-of-life wishes, including whether you want to receive life support in an incapacitated state or terminal condition; deliver it to your doctor and spouse/family. [Advance Directive Form - Idaho:](https://www.caringinfo.org/planning/advance-directives/by-state/idaho/)
<https://www.caringinfo.org/planning/advance-directives/by-state/idaho/>

- Power of Attorney** – Prepare a Limited or General Power of Attorney for the handling of your affairs, to take effect if/when you become mentally disabled.

- Designated Agent** – Identify a person to take care of responsibilities immediately after your death.

- Update Beneficiaries** – Check that insurance, securities, annuities, and other accounts have updated beneficiaries, if warranted.

- Organ Donation** – If you choose, arrange to donate organs and tissues at your death.

- Letter of Instructions** – Prepare a Letter of Instructions that identifies the location of your List of Key Contacts and Important Papers, and spells out immediate responsibilities regarding your home, your bills, your pets, your funeral/burial/cremation, etc. See “Love Letter to My Family” as an example.

- Key Contacts** – Make a list of the names and contact information for closest family and friends, lawyers, accountants, doctors, etc. Label them: “sibling,” “friend,” “attorney,” etc. This will be helpful if you want friends or family to notify others of your condition.)

- Organize Important Papers**
 - List of assets and valuable personal possessions
 - Wills and Trust agreements
 - Deeds and titles, including vehicle titles and registrations
 - Mortgage documents and promissory notes (list of debts)
 - Insurance policies
 - Financial accounts (names and account numbers for bank accounts, stocks and bonds, annuities, credit and debit card accounts, safety deposit box documents and keys)
 - Other financial records (retirement, annuity and pension records, tax returns, financial statements, contracts, etc.)

- ❑ Legal papers (powers of attorney, adoption and divorce papers, prenuptial agreements, military service papers, social security records, citizenship records, passports, proof of intent to donate organs, etc.)
 - ❑ Usernames and passwords for internet accounts
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For more information see Daniel Cobb's *Wills and Estate Planning Study*:

<https://www.caring.com/caregivers/estate-planning/wills-survey/>

Estate Planning: Things to Do Before You Die Investopedia article by Troy Segal:

<https://www.investopedia.com/articles/retirement/10/estate-planning-checklist.asp>

On-line Wills: [The Best Online Will Services of 2022 \(https://www.caring.com/best-online-will-services/\)](https://www.caring.com/best-online-will-services/) = Review of various on-line programs.

[Do Your Own Will Online — Free Online Will \(https://www.doyourownwill.com/\)](https://www.doyourownwill.com/) = Well regarded free will program, very basic. toptenreviews says: "This website creates a basic version of a last will and testament in a matter of minutes for free, but there is very little in the way of support or legal help, so it is mostly only appropriate for very straightforward cases ... It will suit a very straightforward situation where all of a user's estate is being left to one person (with space for some gifts to other parties), and there isn't a complicated portfolio of shares or property to divvy out among several people.... if a user just needs a workable will within minutes, without having to pay for any services, then this website offers little to be critical about.")

Advance Directive (online or downloadable version of the form and directions for registry):

<https://healthandwelfare.idaho.gov/services-programs/birth-marriage-death-records/start-your-advance-directive>

https://www.americanbar.org/groups/law_aging/resources/health_care_decision_making/consumer_s_toolkit_for_health_care_advance_planning/

Organ Donation Information:

<https://publicdocuments.dhw.idaho.gov/WebLink/DocView.aspx?id=20002&dbid=0&repo=PUBLIC-DOCUMENTS>