



# ACTEC Estate Planning Essentials

## How to Talk With Your Parents About Estate Planning Checklist

It's never easy to have end-of-life conversations with your loved ones. How do you talk with your parents about their estate planning documents such as their will, power of attorneys, assets and healthcare proxies? Here is a check list of documents and topics to discuss with your parents and estate planning attorney.

### Advance Medical Directives (end-of-life medical directives)

- Living Will
- Do Not Resuscitate (DNR)
- Healthcare Power of Attorney (a.k.a. Healthcare Proxy)
- Medical Orders - Medical Orders for Life-Sustaining Treatment (MOLST) and Physician Orders for Life-Sustaining Treatment (POLST)
- Durable Power of Attorney (a.k.a. Financial Power of Attorney)
- Do you have long-term care insurance?

### Release Forms

- HIPPA Release Form
- Digital Assets Consent Form

### Planning for the Transfer of Assets

- Will any assets be passing to minors or beneficiaries with medical or addiction issues?
- Are beneficiary designations coordinated with the overall estate plan?
- Do you need a will? Do you need a revocable living trust?
- Have you met with an attorney to create any missing documents?

### Topics for Conversation

- Where are documents located? (will, trust, advance medical directives, life insurance)
- How would you like to be honored?
- Who is the executor of the will? Who is the financial power of attorney?
- Who is trustee of any revocable living trust (if applicable)?

To learn more about these and other topics visit [actec.org/estate-planning](https://actec.org/estate-planning)