



## Spring Clean Your Estate Plan – Maine Family Checklist

Use this checklist each spring to review your estate plan and write in important information.

### Documents

Review your will

Date last reviewed: \_\_\_\_\_

Review any trusts

Date last reviewed: \_\_\_\_\_

Review financial power of attorney

Agent name: \_\_\_\_\_

Review health care directive

Health care agent: \_\_\_\_\_

HIPAA release signed

Guardians named (if applicable)

Guardian names: \_\_\_\_\_

Personal Representative (Executor) named

Name: \_\_\_\_\_

Trustee named (if applicable)

Name: \_\_\_\_\_

Notes:

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## Beneficiaries

Retirement accounts beneficiaries reviewed

Primary: \_\_\_\_\_

Contingent: \_\_\_\_\_

Life insurance beneficiaries reviewed

Primary: \_\_\_\_\_

Contingent: \_\_\_\_\_

Bank accounts POD beneficiaries reviewed

Names: \_\_\_\_\_

Notes:

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## Maine Property & Personal Items

Plan for camp or cabin

Who inherits / plan: \_\_\_\_\_

Plan for land or waterfront property

Plan: \_\_\_\_\_

Plan for boats, snowmobiles, vehicles

Who inherits: \_\_\_\_\_

List for personal items completed (tools, fishing gear, heirlooms, etc.)

Notes:

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## Financial Information

List of bank accounts completed

List of investment accounts completed

List of retirement accounts completed

- Insurance policies listed
- Debts and mortgages listed

Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_  
Financial Advisor: \_\_\_\_\_ Phone: \_\_\_\_\_  
Accountant: \_\_\_\_\_ Phone: \_\_\_\_\_

Notes:

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### **Digital Assets**

- Important online accounts listed
- Passwords stored securely
- Someone has authority to access digital assets

Password location: \_\_\_\_\_  
Authorized person: \_\_\_\_\_

Notes:

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### **Long-Term Care Planning**

- Long-term care plan reviewed
- Power of attorney allows long-term care planning
- Asset protection / Medicaid planning reviewed

Notes:

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## Important Information

Location of estate planning documents: \_\_\_\_\_

Safe deposit box location (if any): \_\_\_\_\_

Who knows where your documents are? \_\_\_\_\_

Emergency contact person: \_\_\_\_\_

Reviewed estate plan this spring

Date: \_\_\_\_\_

**If it has been more than 3–5 years since your estate plan was updated, consider scheduling a review with an attorney.**

Notes:

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**Legal Disclaimer:** This material is for general informational purposes only and does not constitute legal advice. No attorney-client relationship is created using this checklist. This checklist is not a substitute for legal counsel and should not be relied upon as a legal document.

Individuals seeking legally binding estate planning or incapacity planning documents should consult a licensed estate planning or elder law attorney in the State of Maine.