



# Estate Planning Checklist for Single Adults in Maine

Use this checklist to get organized and start putting a plan in place. If you're single, having the right documents and decisions in place is essential to staying in control.

## 1. Choose Your Decision-Makers

Who will step in if you cannot make decisions?

### **Healthcare Decision-Maker (Medical):**

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

Backup: \_\_\_\_\_

### **Financial Decision-Maker (Power of Attorney):**

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

Backup: \_\_\_\_\_

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## 2. Essential Documents

Do you have the following in place?

- Will or Trust
- Durable Power of Attorney
- Healthcare Directive (Advance Directive)

Are your documents up to date?

- Yes  No  Not Sure

Notes:

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### 3. Asset & Account Information

Make sure you have a list of:

- Bank accounts
- Retirement accounts
- Investment accounts
- Real estate/property
- Insurance policies

Where is this information stored?

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### 4. Beneficiaries

Have you reviewed and updated your beneficiaries on:

- Retirement accounts
- Life insurance policies
- Payable-on-death accounts

Are they current?

- Yes  No  Not Sure
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### 5. Pet Planning (If Applicable)

Do you have a plan for your pet?

- Yes  No

Who would care for your pet?

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

Backup: \_\_\_\_\_

Have you set aside funds for their care?

Yes  No

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## 6. Digital Assets

Do you have a list of:

- Online accounts
- Passwords (securely stored)
- Email accounts
- Social media

Does someone you trust know how to access this information?

Yes  No

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## 7. Document Organization

Where are your important documents stored?

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Does someone you trust know where to find them?

Yes  No

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## 8. Plan Review

When was the last time you reviewed your estate plan?

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You should review your plan:

- Every few years
- After major life changes

