



Done?	Task:
<input type="checkbox"/>	Inform your named Personal Representative(s) and successor Trustee(s) where your estate planning portfolio is stored and provide combination(s)/key(s)/location of key(s), if applicable. <i>It is <u>not</u> recommended that you store your estate-planning portfolio in a bank's safe deposit box.</i>
<input type="checkbox"/>	Based on your comfort level, consider providing copies of the estate planning documents to those you have named to serve in the various roles. We also encourage you to provide your Health Care Proxy and HIPAA Authorization to your primary care physician and other medical providers.
<input type="checkbox"/>	IMMEDIATE ATTENTION: Updating your beneficiaries - please refer to the Instructions and Recommendations for Changing Beneficiaries in your estate-planning portfolio in the Other Documents section. <i>As a reminder, these instructions will give you general information to assist you in updating your designated beneficiaries. These instructions are for general knowledge purposes only. Your specific needs and goals may be different from the recommendations outlined. If you would like to discuss your specific assets and circumstances further, please let us know and you may retain us for this additional service.</i>
<input type="checkbox"/>	Add copies of your Beneficiary Designation forms to your estate planning portfolio in the Other Documents section.
<input type="checkbox"/>	Add copies of your most recent bank statements, deed(s), and any other documentation for all assets you currently own to your estate-planning portfolio in the Other Documents section.
<input type="checkbox"/>	Review & complete the following documents in your estate-planning portfolio(s):
<input type="checkbox"/>	Funeral Arrangements (also discuss your wishes with your family and/or send them a copy of this completed form);
<input type="checkbox"/>	Personal Property Memorandum(s);
<input type="checkbox"/>	Letter(s) of Instruction to your Health Care Agent(s);
<input type="checkbox"/>	Letter of Instructions to Guardians and Trustees (if you have minor children);
<input type="checkbox"/>	Key Advisors;
<input type="checkbox"/>	Document Finder/Location Lists;
<input type="checkbox"/>	Personal Family and Legacy
<input type="checkbox"/>	Contact your bank and financial institutions to confirm they will accept your General Durable Power of Attorney, or to request and complete the bank-issued power of attorney. This will ensure there are no issues for your attorney-in-fact in the future. Keep a copy of the bank's power of attorney in your Power of Attorney section of your estate-planning portfolio.
<input type="checkbox"/>	Conduct a digital asset "fire drill" and prepare an inventory of your digital assets.
<input type="checkbox"/>	Pretend you have a complete loss of access to all computers, smartphones, tablets, etc. - How would you obtain access to your digital assets (of financial or sentimental value)? How would your loved ones access your digital assets? Do you have an inventory of your digital assets?
<input type="checkbox"/>	Over the next month, slowly start to inventory all of your digital assets (digital devices like smartphones and computers, data-storage devices, electronically stored data - online financial records, cloud storage, local storage - user accounts, domain names, intellectual property in electronic format, etc.). Ensure your loved ones <i>know</i> what digital assets you have, and <i>how</i> to access them.
<input type="checkbox"/>	Share copies of any completed documents above to Eckert Byrne LLC (via secure share-file, mail, or encrypted email).