

Estate Planning Checklist

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This checklist outlines the essential documents and information you should organize before meeting with a Colorado estate planning attorney in 2026. Gathering these items in advance ensures your consultation is efficient and tailored to your specific needs.

Personal Information & Family Structure:

Assemble full legal names, dates of birth, social security numbers and contact information for the following people:

- Spouse or Partner
- Children and Stepchildren
- Intended Beneficiaries
- Fiduciaries (trusted individuals you are considering for the following roles)
 - Executor/Personal Representative
 - Trustee/Successor Trustee
 - Agents under Power of Attorney (POA)
 - Health Care Agent
 - Guardians for Minors, Primary and Alternate

Notes:

Special Circumstances, If Any:

Note anything that might require specialized legal strategies:

- Blended family dynamics or prior marriages
- Estrangement or potential family conflicts
- Disability or special needs for any family members
- Substance-abuse concerns for beneficiaries
- Creditor issues for beneficiaries

Notes:

Assets & Titling:

Prepare a detailed inventory of the following, including how each asset is currently titled (individual, joint tenancy, or trust):

- Real Estate: Include address, deeds, mortgage statements, and out-of-state property details
- Bank/Investment Accounts: Include institutions, latest balances, and any “Payable on Death” (POD) or “Transfer on Death” (TOD) designations.
- Retirement Accounts: 401(k), IRA, or pension information, including primary and contingent beneficiaries
- Life Insurance: Include carrier, policy numbers, death benefits, and beneficiary designations
- Business Interests: Include ownership percentages, operating/partnership agreements, and recent tax returns

- Personal Property: Vehicle titles, jewelry, art, and digital assets or cryptocurrency
- Future Interests: Information on existing trusts where you are a beneficiary or any expected inheritances

Notes:

Debts & Obligations:

List all outstanding liabilities to provide a clear picture of your net estate:

- Mortgages and home equity lines of credit
- Personal loans, auto loans, and significant credit card balances
- Support obligations including child support or alimony
- Judgments or other legal claims against you

Notes:

Existing Legal Documents:

Bring copies of any current legal documents for your attorney to review:

- Prior Estate Plan: Wills, trusts, POAs, and advance directives
- Marital Agreements: prenuptial or postnuptial agreements
- Family Court Documents: Divorce decrees, custody orders, or settlement agreements

- Identification: Government-issued photo ID

Notes:

Estate Planning Goals:

Identify what you want to achieve with your plan:

- Distribution: who gets what and at what age or milestone?
- Probate Avoidance: strategies like revocable living trusts to bypass Colorado court proceedings
- Privacy: Keeping your family's financial affairs out of the public record
- Tax concerns: Minimizing federal estate or gift taxes (Colorado does not have a state estate tax)
- Charitable giving: Designating specific bequests to non-profits or foundations

Notes: