



# YOUR TEXAS ESTATE PLANNING CHECKLIST

A CLEAR, STRESS-FREE WAY TO UNDERSTAND WHAT ESTATE PLANNING COVERS AND WHAT TO THINK ABOUT BEFORE TALKING TO AN ATTORNEY.



## 01 THE BASICS

Estate planning usually includes decisions about:

- Who makes decisions for you if you can't.
- Who receives your assets.
- How medical and financial choices are handled.
- How to avoid confusion or conflict later.

You don't need answers yet — **just awareness.**

## 02 PEOPLE TO THINK ABOUT

Start by listing:

- A trusted person for **medical** decisions.
- A trusted person for **financial** decisions.
- Anyone you would want to care for children or dependents.
- Backup choices, just in case.

\*These don't have to be final.\*



## 03 WHAT YOU OWN

(Big Picture Only)

You don't need exact values. Just note:

- Property or real estate.
- Vehicles.
- Bank accounts.
- Retirement or investment accounts.
- Business interests.
- Personal items that matter to you.

## 04 WHAT YOU OWE

Make a simple note of:

- Mortgages.
- Loans.
- Credit cards.
- Other obligations.

This helps create a realistic plan later.



## 05 WHAT MATTERS MOST TO YOU

Ask yourself:

- Do I want to make things easier for my family?
- Do I want certain things to stay in the family?
- Do I want to reduce stress, cost, or court involvement?

Your values guide the plan.

## 04 LIFE "WHAT IFS"

Consider:

- What if something unexpected happens?
- What if my first choice isn't available?
- What if family dynamics change?

Planning ahead gives peace of mind.



## 05 QUESTIONS TO BRING TO AN ATTORNEY

Write down:

- Things you're unsure about.
- Situations you're worried about.
- Questions you've been putting off.

You don't need perfect answers — **just a place to start.**

