

# 2025 New Year's Resolutions for Estate Planning

1. **Create your estate plan:** Make sure your estate planning documents are complete.
2. **Make documents easy to find:** Put them somewhere logical in your home so your loved ones will be able to find them.
3. **Communicate with your loved ones:** Tell them where the documents are and make sure the people named as personal representatives in your estate planning know they are.
4. **Share copies of your estate planning:** Share the most critical documents with your loved ones so they have them.
5. **Make sure your estate planning is up to date:** If it has been 3-5 years since you updated your estate planning documents, make an appointment with an estate planning attorney to review your plan and ensure it reflects your wishes and the current state of law.
6. **Update beneficiary designations:** Regularly review and update beneficiaries on all financial accounts (e.g., retirement plans, life insurance, and bank accounts) to ensure they align with your current wishes.
7. **Create an inventory of assets:** Prepare a comprehensive list of your assets, including accounts, real estate, vehicles, investments, and valuables, along with their locations and account numbers. This will help your loved ones handle your estate more efficiently.
8. **Create a digital asset plan:** Document login credentials and instructions for digital accounts, including financial accounts, email, social media, and subscription services. Ensure trusted individuals know how to access them.
9. **Plan for incapacity:** Confirm you have current medical and financial powers of attorney to designate decision-makers in case of incapacity. Also, review your living will or advance healthcare directive.
10. **Create an ethical will:** Write a non-binding document that shares your values and guidance to offer clarity and emotional support to loved ones.

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