

TRUSTED DC NOTARY

ESTATE PLANNING DOCUMENTS CHECKLIST

ENSURE YOU HAVE
EVERYTHING YOU NEED



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Getting your estate planning documents in order provides peace of mind for you and your loved ones.

This easy-to-use checklist outlines the key documents you may need and helps you prepare for a seamless notarization experience.

CORE ESTATE PLANNING DOCUMENTS

Will: Dictates how your assets will be distributed after your passing.

Trust: Revocable Living Trust, Allows you to manage assets during your lifetime and avoid probate.

POWER OF ATTORNEY

Financial Power of Attorney: Designates someone to handle your financial matters.

Healthcare Power of Attorney: Names a person to make medical decisions if you are unable.

Advance Healthcare Directive (Living Will): Outlines your medical care preferences in end-of-life situations.

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READY TO TAKE THE NEXT STEP?

Trusted DC Notary is here to provide convenient and secure notarizations for your estate planning needs. Contact me today to schedule a consultation and ensure your documents are properly executed.

[CLICK HERE](#)





TERMS & DEFINITIONS

Probate: The legal process of validating a will and distributing assets.

Executor: The person named in a will to handle the distribution of assets.

Beneficiary: A person or entity who receives assets designated in a will or trust.

Intestate: Dying without a valid will.

Asset: Property or possession with monetary value.