

ESTATE PLANNING CHECKLIST

Ensure your family survives the chaos if you aren't there.

Phase 1: Audit

- ☐ List all accounts & nominees
- ☐ Identify accounts with "Single" holding

Phase 2: Gaps

- ☐ Will created/updated?
- ☐ Executor appointed?

Phase 3: Action

- ☐ Convert accounts to "Joint/Survivor"
- ☐ Update mismatched nominations
- ☐ Create "Master Instruction Sheet"

Phase 4: Digital

- ☐ Upload docs to DigiLocker/Vault
- ☐ Share access with spouse/executor

Don't leave your legacy to chance.
Contact us to professionalize your estate plan.
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