

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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