



SOUTHERN
ESTATE PLANNING
— LAW GROUP —

10 Estate Planning Must-Haves To Protect Your Family Today

www.southernestateplanninglaw.com email: contact@southernestateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor

Estate planning is not just for the wealthy — it's for anyone who wants to protect their loved ones, preserve their assets, and avoid costly court battles.

Use this checklist to see if your plan covers these essentials — and where gaps could put your family at risk.

The Checklist:

1. Last Will & Testament

Do you have a valid, up-to-date will that clearly states who inherits your assets and who will care for your minor children?

Common objection: “I don’t need a will because I’m not rich.”

Truth: Without a will, your state decides who gets what — regardless of your wishes.

2. Living Trust

Have you established a trust to avoid probate and keep your affairs private?

Common objection: “Trusts are only for the wealthy or complicated estates.”

Truth: Trusts can save your family thousands in probate fees and delays — no matter your estate size.

www.southernstateplanninglaw.com email: contact@southernstateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor

3. Guardian Nomination for Minor Children

Have you legally named guardians for your children if you're unable to care for them?

Common objection: "My spouse will just take care of the kids."

Truth: Without naming guardians, the court decides — which may not be who you want.

4. Healthcare Directive (Living Will)

Have you specified your wishes for medical care if you can't speak for yourself?

Common objection: "My family knows what I want."

Truth: Without written instructions, family disagreements can delay critical care.

5. Durable Power of Attorney

Have you appointed someone to handle your financial affairs if you become incapacitated?

Common objection: "I don't want to burden anyone."

Truth: Without this, a court-appointed guardian may take control — often after expensive delays.

www.southernstateplanninglaw.com email: contact@southernstateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor

6. Asset Inventory Sheet

Have you documented all your assets — bank accounts, property, investments?

Common objection: “My family knows what I own.”

Truth: Missing assets can cause delays, losses, or disputes.

7. Digital Assets Plan

Have you planned for your online accounts, social media, and digital property?

Common objection: “Digital stuff doesn’t matter.”

Truth: Accessing digital assets without a plan can be legally complicated or impossible.

8. Letter to Loved Ones

Have you written personal guidance or messages to ease your family’s burden?

Common objection: “That feels unnecessary.”

Truth: Personal letters provide clarity and comfort during difficult times.

9. Beneficiary Designations

www.southernstateplanninglaw.com email: contact@southernstateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor

Have you reviewed and updated beneficiaries on retirement plans, insurance, and accounts?

Common objection: “I set them once — that’s enough.”

Truth: Life changes — marriage, divorce, birth — can make old beneficiary forms outdated.

10. Emergency Contact List

Do your trusted contacts have access to important people and professionals involved in your affairs?

Common objection: “Everyone knows who to call.”

Truth: In an emergency, having a clear contact list saves precious time and reduces confusion.

Why This Checklist Matters

Ignoring even one item can create costly delays, family stress, or worse — lost assets and contested decisions.

Planning is an act of love — not just for you, but for those who will carry your legacy forward.

Next Steps



www.southernstateplanninglaw.com email: contact@southernstateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor

If you're missing any of these essentials or unsure, Southern Estate Planning Law Group can help you fill the gaps with confidence and care.

www.southernestateplanninglaw.com email: contact@southernestateplanninglaw.com



Scan to Schedule a free 15-Min Call with Attorney Ada Egbufor