Legata Planning Prep Checklist

Before you get started, having a few details on hand can make everything feel smoother and less stressful. You can pause whenever you need and return anytime, and your information will always be saved for you. Legata walks alongside you through each step, offering clear guidance as you go. The FAQs in the application also help by breaking down key terms and roles with simple, friendly explanations and real-world examples.

People & Roles

You'll be asked for the full legal names and addresses of:

- ☐ You, your spouse or partner, and any children
- ☐ The beneficiaries you want to include
- ☐ The key people who will help carry out your plan, such as your executor, powers of attorney, guardian, and trustee

Money & Property

This section is optional, but adding details about your assets now helps estimate potential estate taxes and assess whether advanced planning strategies may be needed. It also keeps all essential information in one secure place for your fiduciaries and loved ones when you are gone. You can update this information anytime.

You may want to gather:

- ☐ Property addresses and estimated values
- ☐ Bank and investment account information
- ☐ Life insurance details
- ☐ Debts such as mortgages, loans, or credit cards
- ☐ Business or private company investments

End-of-Life Wishes

You'll also make important decisions, including:

- ☐ Health care decision maker, if you are unable
- ☐ Health care directive
- ☐ Organ donation preferences
- ☐ Preferences for your remains

Legata