

CLEARLEGALTIPS.COM

Free Legal Resource · 2026

© 2026 ClearLegalTips.com — Informational only, not legal advice.

Estate Planning Next-Steps Checklist

Action Checklist — ClearLegalTips.com (2026)

Act on your results.

If Moderate/High

Reviewed beneficiary designations

Looked into a revocable living trust

Confirmed your state's estate-tax threshold

Everyone

Have a valid will

Named a guardian for minor children

Stored documents and told your executor

Notes

This resource is provided by ClearLegalTips.com for general informational purposes only and does not constitute legal advice. Laws

vary by state and change over time. Consult a licensed attorney for advice specific to your situation.