GRAND RAPIDS · WEST MICHIGAN

Michigan Estate Planning Checklist

A practical starting point for organizing your affairs

You don't need to have all the answers before you start. This checklist is meant to help you think through what you have and what you might need — not to replace a conversation with an attorney.

Core documents

- [ ] **Last will & testament**
  Names who receives your assets and who cares for minor children if something happens to you.
- [ ] **Revocable living trust (if appropriate)**
  Can help your family avoid probate court and keep your affairs private. Not everyone needs one.
- [ ] **Financial power of attorney**
  Names someone to manage your finances and property if you're ever unable to.
- [ ] **Patient advocate designation**
  Michigan's version of a healthcare power of attorney — names who makes medical decisions for you.
- [ ] **Beneficiary designations reviewed**
  Life insurance, 401(k)s, and IRAs pass by beneficiary form, not your will — worth double-checking these are current.

Things worth reviewing

- [ ] **Guardianship provisions for minor children**
  If you have children under 18, your will should name a guardian you trust.
- [ ] **Real estate ownership reviewed**
  Check how your home and any other property is titled — it affects whether it goes through probate.
- [ ] **Life insurance policy reviewed**
  Confirm coverage still matches your family's needs and beneficiaries are up to date.
- [ ] **Retirement accounts reviewed**
  401(k), IRA, and pension beneficiary designations should align with the rest of your plan.
- [ ] **Digital assets accounted for**
  Email, photos, financial accounts, and passwords — someone should know how to access or close these.
- [ ] **Business interests addressed (if applicable)**
  A succession or buy-sell plan protects the business and your family if something happens to you.
- [ ] **Potential estate-tax exposure discussed (if applicable)**
  Relevant mainly for larger estates — worth a conversation if this might apply to you.

What happens next

Using this checklist to prepare for a consultation

You don't need to have this fully checked off before reaching out.

Most people start with only a few of these boxes checked — that's normal. The point of a free consultation is to walk through your specific situation together and figure out what actually applies to you. Some people only need a simple will. Others benefit from a full living trust. There's no one-size-fits-all answer, and you won't be pressured into more than you need.

How Matthew can help

- [ ] **Free initial consultation**
  A 30-45 minute conversation, no obligation, to talk through your situation and what makes sense.
- [ ] **Transparent flat-fee pricing**
  You'll know the cost before we start — no hourly billing surprises. Simple wills start at $450; living trust packages at $1,200.
- [ ] **Evening & Saturday appointments**
  Weekday evenings (5–8pm) and Saturdays (9am–3pm) — built for people who work full time.
- [ ] **Plain-English guidance**
  No unnecessary legal jargon. You'll understand every document you sign and why it's there.

Ready to talk it through?

Schedule your free consultation at hantleestateplanning.com
or call (616) 443-4167