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Trustee

Estate Planning Checklist

Plan ahead for peace of mind

Use this checklist to ensure that your wishes are known and that your loved ones are supported.

1

Create or update your Will

Appoint an executor.

Describe how you want your assets distributed.

Nominate guardians for children (if applicable).

Review and update your Will every 3-5 years or after major life changes.

2

Enduring Power of Attorney

Appoint an Attorney, someone you trust to make financial and legal decisions if you are unable.

Seek legal advice if needed.

3

Enduring Guardianship

Appoint a guardian, someone you trust to make health and personal decisions if you are unable.

Discuss your health and personal care wishes with loved ones and guardian.

4

Advance Care Planning

Complete an Advance Care Directive (ACD).

Discuss your health care wishes with family and medical professionals.

5

Organise your financial information

Fill out a personal record book.

Give your loved ones a copy of your personal record book or ensure that they know where to find it.

Include logins and passwords in a secure location.

6

Communicate your wishes

Talk to your family and loved ones about your plans.

7

Review your legacy

Write a personal legacy letter or record a video message.

Think about the values and stories you want to pass on.

Document any charitable gifts or bequests you want to make.

Tip

Consider using the Public Trustee or your local solicitor for professional support to ensure your wishes are legally protected.

Disclaimer - This information is general information and should not be considered personal legal advice.

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