

## Updating Estate Beneficiaries and More: A Pre-Vacation Tick List

Jul 13, 2011 by Janet Brewer

### Taking a break this summer?

It may seem like a drag to discuss estate planning in these warm summer months, but see if you can fit in some essential steps. Among other benefits, you may feel a deeper sense of well being during family visits and vacations, if you know you have planned for everyone you love and everything you own.

### My mental tick list

Here are the things I mentally tick through before any big out of town trips:

1. Do I have a chosen a reliable trustee or executor?
2. Does my trustee/executor have access to my key documents? (If they are in a safety deposit box or safe, for example, do they have a key or combination handy, just in case?)
3. Do I have enough coverage from my life insurance policy?
4. Are the beneficiary designations on my life insurance, retirement plans and annuities, in synch with my estate plan? (For most people I've helped, they are not.)
5. Is my living will and healthcare power of attorney up-to-date with the HIPAA Act?
6. Has anything changed that my advisors need to know about before I go?
7. Last but not least, have I included provisions in our estate plan for care of our family pets?



*Peaceful moments with a child, grandchild, or other family member may be the very best thing about taking vacation. Before you head out of town, tick off essential estate planning steps like updating your beneficiaries. Knowing you've planned for everything you own and everyone you love might make the time together even more fulfilling. [Learn more »](#)*

## **Getting essentials squared away before you leave town**

Have I convinced you to at least check into these things before you leave town? If so, we are here to help. And unless you're leaving town tomorrow, we can probably get essential work done before you go -- freeing you to take a restful, guilt free holiday. [Get started using a convenient form here at our website »](#)

## **Checklists and guides that may help you**

Here are guides I've published that might help you:

- [Choosing Your Bay Area Estate Planning Attorney](#)
- [Picking Your Trustee in California: A Guide for High Net Worth Individuals](#)