



ESTATE READINESS CHECKLIST FOR ADVISORS

Use this document to help clients decide if they need a digital tool to keep their information organized.

1. Do your client loved ones know where to find your essential documents? *Wills. Insurance. IDs. Key records.*

☐ Yes ☐ No

2. Does your client have all of their financial information documented in one place? *Accounts. Insurance details. Contacts. Bills. Subscriptions.*

☐ Yes ☐ No

3. If something happened to your client today, would someone know the first steps to take? *Who to call. What to do first. Where to begin.*

☐ Yes ☐ No

4. Does your client have passwords and digital accounts organized and accessible?

☐ Yes ☐ No

5. Has your client shared key information with your next of kin or a trusted person?

☐ Yes ☐ No

6. Does your client have instructions for how the household runs? *Bills. Services. Routines. Home responsibilities.*

☐ Yes ☐ No

7. Does someone know how to access your client's devices?

☐ Yes ☐ No

8. Do your client's beneficiaries know where things are and what your intentions are?

☐ Yes ☐ No

9. Does your client have emergency contacts, advisors, and key relationships documented? *Doctors. Financial professionals. Family contacts. Service providers.*

☐ Yes ☐ No

10. Does your client feel confident their family would not be overwhelmed?

☐ Yes ☐ No

11. Has your client had any major life or financial changes recently?

☐ Yes ☐ No

12. Has your client gotten married, had a child, or experienced a major family change recently?

☐ Yes ☐ No

Our Advisor Solutions Team is here to help.

Contact us at advisors@nextofkinplan.com or visit nextofkinplan.com/support-advisors.