



DENNIS H. MILLER
Attorney at Law
dennis@miller-law.net

• GORDON A. MILLER
Attorney at Law
gordon@miller-law.net

• TREVOR A. DANIEL
Attorney at Law
trevor@miller-law.net
*also admitted in Florida

Office: 313.386.1400 • Fax: 313.386.3845

ESTATE PLANNING CHECKLIST

Designation of Individuals

* Please provide all individuals' full legal name(s) and current address *

- List of individuals who you want to receive specific property
- Personal Representative / Successor Trustee (person in charge of your Trust Estate)
- Medical Patient Advocate and alternate advocate
- Financial Durable Power of Attorney and alternate power of attorney
- Guardian(s) for minor children

Documents regarding the following Personal Property / Financial Accounts:

- Any/all Bank Accounts, CD's, Money Market
- Any/all Deeds to Real Property
- Any/all Life Insurance Policies
- Any/all 401(k), IRA, Annuities, etc.
- Any/all Stocks and Bonds
- List of any/all Personal Property / Vehicles

Notes: _____

