2nd HARVEST

Peace of Mind Checklist

Six Steps to Protect the People and Causes You Love

Creating or updating an estate plan is one of the most meaningful ways to care for the people you love and ensure your wishes are honored. Whether you're creating a plan for the first time or reviewing an existing one, this checklist will help you get organized and prepare for conversations with your loved ones and professional advisors.

Please note: This checklist is intended to provide general information and is not legal, tax or financial advice. Because every situation is unique, we encourage you to consult qualified professionals about your individual circumstances.

Step 1: Review Your Core Estate Planning Documents

Check any documents you currently have in place:

□ Last Will and Testament
□ Revocable Living Trust
□ Durable Financial Power of Attorney
□ Healthcare Power of Attorney
□ Advance Healthcare Directive/Living Will
□ HIPAA Authorization
□ Other estate planning documents

Questions to Consider

□ Do I have a current will?
□ Have I reviewed these documents within the last three to five years?
□ Have there been major life changes since my last update (marriage, divorce, children grandchildren, relocation, etc.)?
□ Are my chosen representatives still appropriate?
□ If applicable, have I named guardians for minor children?

Step 2: Review Beneficiary Designations

Take a few minutes to make a list of your major assets and accounts. This can help ensure that nothing is overlooked during your review. Many assets pass directly through beneficiary designations rather than a will.

Review:

☐ Retirement accounts (401(k), 403(b), IRA)
☐ Life insurance policies
☐ Bank accounts with payable-on-death designations
☐ Investment accounts
☐ Annuities

Questions to Consider

☐ Are my primary beneficiaries current?
☐ Are my contingent beneficiaries current?
☐ Do my beneficiary designations align with my wishes?

Step 3: Organize Important Information

Gather and store key information in a secure location.

Personal Information

☐ Birth certificate
☐ Marriage certificate
☐ Social Security information
☐ Military records (if applicable)

Financial Information

☐ Bank account information
☐ Investment account information
☐ Retirement account information
☐ Insurance policies
☐ Mortgage information
☐ Property records

Digital Information

□ Online account inventory
□ Password management plan
□ Digital asset instructions (email, social media, cloud storage, photos, cryptocurrency, etc.)

Step 4: Review Your Personal Representatives

Consider who you have chosen to act on your behalf.

Executor or Personal Representative

Name: ______________________________
Have I confirmed they are willing to serve?
□ Yes □ No

Healthcare Agent

Name: ______________________________
Have I discussed my wishes with them?
□ Yes □ No

Financial Power of Attorney

Name: ______________________________
Have I reviewed this choice recently?
□ Yes □ No

Step 5: Communicate Your Wishes

Important conversations can help prevent confusion and stress for loved ones.

□ Family members know where important documents are located.
□ Key decision-makers understand my wishes.
□ Emergency contacts are current.
□ Important records are accessible when needed.
□ My executor or another trusted person knows how to access my estate planning documents.

Step 6: Reflect on Your Values

Estate planning is about more than finances. It's an opportunity to consider the legacy you wish to leave.

Consider:

◻ What values do I hope to pass on?
◻ What impact would I like to make in my community?
◻ Are there organizations or causes I care deeply about?
◻ Have I documented any charitable intentions?

Final Check

◻ I know where my important documents are stored.
◻ My loved ones know how to access them if needed.
◻ My beneficiary designations are current.
◻ My estate planning documents reflect my current wishes.
◻ I have identified any updates I need to make.
◻ I have scheduled time to meet with an attorney or advisor if needed.
◻ I plan to review my estate plan every three to five years, or after a major life event.

Optional Legacy Giving Information

Considering a Gift to Second Harvest?

Many supporters choose to include charitable organizations in their estate plans as a way to support the causes they care about beyond their lifetime. Gifts of any size can help ensure families in our community have access to nutritious food for generations to come.

If you choose to include Second Harvest in your plans, we would be honored by your partnership.

Ways to Include Second Harvest

□ A specific dollar amount
□ A percentage of your estate
□ The remainder (or a portion of the remainder) of your estate
□ A beneficiary designation on a retirement account, life insurance policy or other financial account

Sample Bequest Language to Include in a Will

I give, devise and bequeath to Second Harvest, a Washington nonprofit corporation (Tax ID: [EIN] 23-7173826), located in Spokane, Washington, ____ percent (%) of my estate, or the sum of $______, or the residue of my estate, to be used for its general charitable purposes.

Questions?

If you are considering a gift to Second Harvest through your estate plans, we would be honored to provide additional information. We encourage you to consult your attorney, financial advisor or tax professional when making estate planning decisions.
If you have questions about supporting Second Harvest through your estate plans, please contact:

Second Harvest

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