Oceanic Society

Estate Planning
Starter Checklist

Estate planning does not have to be overwhelming. This checklist is designed to help you take a few thoughtful steps toward clarity and peace of mind.

DOCUMENTS & ACCESS

- ◯ I have a will or trust
- ◯ It reflects my current wishes
- ◯ It has been reviewed in the last 3–5 years
- ◯ I know where my documents are stored
- ◯ A trusted person knows how to access them

VALUES & LEGACY

- ◯ I have reflected on causes I care about
- ◯ I understand how charitable giving fits
- ◯ into estate planning
- ◯ I have explored legacy giving options

BENEFICIARY DESIGNATIONS

- ◯ Retirement accounts (401(k), IRA)
- ◯ Life insurance policies
- ◯ Bank and investment accounts
- ◯ Donor-advised funds

PEOPLE & RESPONSIBILITIES

- ◯ Beneficiaries are identified
- ◯ An executor or trustee is named
- ◯ Guardians are designated (if applicable)
- ◯ Healthcare and financial decision-makers are identified

Want to learn how ocean conservation can be part of your legacy?
Explore legacy giving at oceanicsociety.org or contact donations@oceanicsociety.org

For informational purposes only. Not legal or financial advice.