



Estate Plan Preparation Checklist

You will need the following information and/or documents in hand when you meet with an attorney to complete your AIPRA-compliant estate plan:

- A government-issued form of identification
- The name of Tribe where you are enrolled, if any, and District
- Your Tribal Enrollment Number
- If you own real estate (land, a farm, a house, etc.), you will need:
 - a copy of your title or deed
 - a copy of your mortgage documents
- If you have ever been married or are currently married, you will need:
 - the legal name (first, middle and last) of your current spouse and any former spouse(s)
 - a copy of your marriage certificate(s)
 - a copy of your divorce decree(s), if any
- If you have children, a list of all of your children's legal names and birthdates (this includes legally adopted children)
- If you have stepchildren that you have legally adopted, a list of their legal names and birthdates
- If you have minor children at the time of your death and if the child(ren)'s natural or adoptive parent is not able to act as guardian, the court can appoint the person you name to act as legal guardian to your children. If you have children under the age of 18, decide who you would like to have serve as guardian and select an alternative person should your first choice be unable to care for your children
- If you have stepchildren that you have not legally adopted, but that you would still like to include in your will, a list of their legal names and birthdates
- If there is anyone you would like to specifically exclude from your will, you will need their legal name(s) and relationship to you
- The name, mailing address and phone number for a person you would like to serve as your personal representative (sometimes called an "executor") who makes sure your estate is administered according to your wishes after your death. You will also need the same information for a second person, an alternate, who will serve as personal representative if your first choice is unable to serve (Often, a person will select his or her spouse to fill one of these roles.)

(turn over)



Indian Land Tenure
F O U N D A T I O N.

- If you own or lease Indian Trust Land or have an IIM Account, you will also need:
 - a copy of your Individual Trust Interest Report
 - a copy of your Individual Indian Monies Statement of Account
 - a copy of any BIA correspondence
 - a copy of deeds for any fee land or other forms of title documents

- In addition, a “financial inventory” will need to be taken, so be prepared with documents showing ownership, approximate values and official statements, if any, for the following assets and liabilities:
 - Home
 - Other Real Estate
 - Checking, Savings, Money Market Accounts
 - Automobile
 - Retirement Accounts
 - IRA/Pensions/401K
 - Home Mortgage
 - Life Insurance (Policy Name/Number, Owner, Insured, Beneficiary)
 - Other Assets or Liabilities

- A list of any questions you might have for your attorney.