Scan or click on the QR code to request your complimentary Discovery Session

Legacy Planning Checklist

Protect your family, preserve your wealth, and pass on your values.

Estate Documents

- ☐ Last Will and Testament
- ☐ Revocable Living Trust (if applicable)
- ☐ Durable Power of Attorney (Financial)
- ☐ Healthcare Power of Attorney
- ☐ Living Will / Advance Healthcare Directive
- ☐ HIPAA Authorization Form

Asset Inventory

- ☐ List of all banks, brokerage, and retirement accounts
- ☐ Real estate holdings and deeds
- ☐ Life insurance policy details
- ☐ Business ownership or partnership agreements
- ☐ Safe deposit box access information
- ☐ List of digital assets (logins, passwords, crypto, etc.)

Beneficiary Designations

- ☐ IRA and 401(k) accounts updated
- ☐ Reviewed Life insurance policies
- ☐ Bank and investment accounts with TOD or POD designations
- ☐ Guaranteed income accounts reviewed for beneficiary accuracy

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Tax & Legal Review

- ☐ Estate tax exposure evaluated
- ☐ Gifting strategy reviewed
- ☐ Trusts established or updated
- ☐ Charitable giving plan in place (if applicable)

Family Communication

- ☐ Spouse/partner knows where documents are stored
- ☐ Children/heirs informed of wishes and responsibilities
- ☐ Family meeting scheduled (if appropriate)
- ☐ Letter of Intent or ethical will written (optional)

Storage & Organization

- ☐ All documents stored securely and accessibly
- ☐ Copies given to trusted professionals (attorney, advisor, executor)
- ☐ Emergency contact list compiled
- ☐ Schedule a regular review (every 2–3 years)

Take the Next Step:

Ready to Put the Pieces Together?

This Legacy Checklist is just one piece of your full SmartRetire™ Strategy. In a Discovery Meeting, we'll help you take stock of where you are today and begin shaping a plan that aligns your retirement, tax, and legacy goals—so nothing gets left to chance.

During this no-cost, no-obligation session, you'll walk away with:

- Clarity around where your legacy plan stands today
- Guidance on the next steps for protecting your family and assets
- A framework for building your full SmartRetire™ Strategy

Let's ensure your wishes are honored and your wealth is transferred efficiently.

Call 859-372-6727 or visit
www.CreativeAssetSolutions.com
Or simply Click or scan the QR code to book your appointment now!

This Checklist is part of the full SmartRetire Strategy™

Kevin Bard, Financial Advisor

Kevin Bard is the Owner and Founder of Creative Asset Solutions, LLC, a respected financial consultant, educator, and author. He is a retirement planning authority. His strategies have helped his clients preserve their wealth and increase their family legacy. Over the past 30+ years Kevin has utilized a unique educational process that has allowed his clients to be better informed about the numerous income, investment, and insurance choices available today.

Kevin is a series 65 investment advisor representative with Creativeone Wealth, LLC and holds firm to his fiduciary responsibilities. Kevin's firm is based in Northern Kentucky with branch offices in Cincinnati, Blue Ash, West Chester and in Clinton Township, MI.

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PLANS THAT WORK. PEOPLE WHO CARE.