Family Planning Legal Checklist

Use this simple checklist to ensure your parents (or you) are legally and financially prepared for later life.

WILLS

- ☐Has a valid Will been made?
- ☐Is the Will up to date (e.g., after marriage, divorce, new grandchildren)?
- ☐Have executors been chosen and informed?
- ☐Have funeral wishes been documented (optional in a Will)?

LASTING POWERS OF ATTORNEY (LPA)

- ☐Is there a Health & Welfare LPA in place?
- ☐Is there a Property & Financial Affairs LPA in place?
- ☐Are attorneys trustworthy and willing to act?
- ☐Have LPAs been registered with the Office of the Public Guardian?

PROPERTY & ASSET PLANNING

- ☐Is the family home jointly owned or in one name only?
- ☐Have you considered a property protection trust (especially for care fee planning)?
- ☐Is the title 'tenants in common' if required for planning?
- ☐Has inheritance tax planning been considered?

OTHER LEGAL & FINANCIAL PLANNING

- ☐Are bank accounts and investments easy to access if needed?
- ☐Are pensions and life insurance policies documented and accessible?
- ☐Are there digital assets or online accounts with important information?
- ☐Have advance decisions (living wills) been discussed?

DOCUMENT STORAGE

- ☐Do loved ones know where legal documents are kept?
- ☐Are copies of key documents safely stored (e.g. LPAs, wills)?
- ☐Has a list of important contacts been created (e.g. solicitor, GP, financial adviser)?