

# ESTATE PLANNING CHECKLIST

Planning your estate is an important step in caring for the people and causes you love. This checklist can help you gather information and think through your wishes before you meet with an attorney or financial advisor. *(For educational purposes only. Consult an attorney or financial advisor for advice.)*

## Personal & Family Information

- Full legal name and contact information
- Date and place of birth
- Marital status
- Spouse/partner name and contact info
- Names of trusted individuals you may want to name as executor, trustee, or agent

## Important Documents to Locate

- Existing will or trust *(if any)*
- Powers of attorney *(financial and healthcare)*
- Advance healthcare directive or living will
- Marriage certificate or divorce decree
- Birth certificates & Social Security info
- Military records *(if applicable)*

## Financial Accounts & Assets

- Bank accounts *(checking, savings, CDs)*
- Retirement accounts *(IRA, 401(k)/403(b), pension)*
- Investment accounts *(brokerage, mutual funds)*
- Life insurance policies
- Real estate *(home, land, other property)*
- Business interests
- Valuable personal property *(art, jewelry, collections)*

## Beneficiaries & Distributions

- Primary and contingent beneficiaries for each account
- Individuals/organizations you wish to support
- Special considerations for minors or loved ones with special needs
- Items or assets you wish to leave to specific individuals

## Charitable Giving Intentions

*Many donors include nonprofits, like Bernheim Forest and Arboretum, as a way to protect places and values they care about for future generations.*

- Causes and organizations important to you
- If you would like to include a gift to a nonprofit in your plans
- Assets you might consider for charitable giving *(cash, retirement assets, real estate)*
- If your gift will support a specific purpose or be used where the need is greatest

## Guardianship & Care Considerations

- Guardians for minor children *(if applicable)*
- Care plan for pets
- Instructions/wishes related to long-term care

## Final Wishes & Personal Notes

- Funeral or memorial preferences
- People you'd like notified
- Digital assets *(email, social media, online accounts)*
- Personal messages/letters you wish to leave

## Your Professional Advisors

- Attorney
- Financial advisor
- Accountant

## Next Steps

- Schedule meeting with estate planning attorney
- Share location of important documents with a trusted person
- Review beneficiary designations regularly
- Revisit your plan after major life events

## LEARN MORE ABOUT LEAVING A LEGACY

If you are considering a gift to Bernheim, our team is happy to share general information about legacy giving options and how they support our mission – without obligation or pressure. If you already have a planned gift to Bernheim, let us know. You'll become part of The Echo Society, which comes with acknowledgement and invitations to special events.

**Contact:** [advancement@bernheim.org](mailto:advancement@bernheim.org) or (502) 215-7137.





**MISSION:**  
*Connecting People  
with Nature*

**VISION:**  
*A World Where Nature  
is Cherished, Protected  
and Restored.*

**PROTECTED 18,000 ACRES**  
of forests, wetlands, and wildlife habitat,  
ensuring long-term conservation and  
biodiversity stewardship.

**WELCOMED 302,000  
VISITS,** connecting people from all 50  
states and multiple countries with nature.

**CELEBRATED 45 YEARS OF  
ARTISTS IN RESIDENCE,**  
hosting 80 artists from 13 countries who  
explored humanity's relationship with  
nature through art.

**INSTALLED "HEART OF  
THE FOREST" TIN MAN  
SCULPTURE,** engaging over 5,600  
visitors in reflection on care for the  
natural world.

**ENGAGED 75,200 VISITORS  
IN PLAYCOSYSTEM,** supporting  
nearly 91,000 nature-based play  
experiences for all ages and abilities

**OPENED A WHEELCHAIR  
ACCESSIBLE TREEHOUSE,**  
built from felled trees at Bernheim to  
ensure inclusive play for visitors of all  
abilities.

**SUPPORTED NATURE-BASED  
PLAY BEYOND BERNHEIM,**  
helping design 9 new nature playgrounds  
regionally and nationally through the  
Children at Play Network

**HOSTED 11 FREE PLAY DAYS,**  
welcoming more than 4,200 attendees,  
including foster families, through health  
and community partnerships.

**TRACKED GOLDEN EAGLE  
MIGRATION OVER 6,455  
MILES,** contributing to regional and  
international conservation research.

**EDUCATED 10,877  
STUDENTS FROM 119  
SCHOOLS,** through immersive field  
trips that inspire lifelong relationships  
with nature.

**PROVIDED 349 PUBLIC  
PROGRAMS,** including guided  
hikes, night programs, and birding  
experiences for all ages.

**EARNED NATIONAL  
ACCREDITATION FOR OUR  
OAK COLLECTION,** preserving  
50 taxa, including rare and endangered  
species.

**HARVESTED 3,000 POUNDS  
OF PRODUCE** from the Edible  
Garden, supporting Isaac's Café and  
community food partners.

**LAUNCHED MAJOR  
STREAM AND WETLAND  
RESTORATION PROJECTS,**  
including nearly one mile of stream  
rerouted to improve water quality and  
habitat.

**EXPANDED POLLINATOR  
HABITAT ACROSS 15 ACRES,**  
supporting insects and wildlife essential  
to ecosystem health

**VIEW  
THE 2025  
IMPACT  
REPORT**

