YOUR LEGACY CHECKLIST:

SIX STEPS TO PROTECT WHAT MATTERS MOST

Create peace of mind for yourself and clarity for your loved ones by having a thoughtful, organized plan in place for the future.

ORGANIZE WHAT YOU OWN

☐ **List your assets**	Document all real estate, investments, retirement accounts, personal property, and bank accounts.
☐ **Identify meaningful possessions.**	Note any items—financial or sentimental—you wish to pass on to specific people or organizations.
☐ **Keep everything secure and accessible.**	Ensure your executor knows where your records and important documents are stored.

PUT YOUR WISHES IN WRITING

☐ **Draft or update your will.**	A will is the foundation of any good estate plan, ensuring your wishes are honored.
☐ **Consider establishing a trust.**	Trusts can help avoid probate and simplify how assets are passed on.
☐ **Include the Naval Academy Foundation in your plans.**	A bequest is one of the most straightforward ways to create a legacy that supports future midshipmen.

PLAN FOR HEALTH & CARE DECISIONS

☐ **Create a living will or advance directive.**	Document your healthcare preferences for future peace of mind.
☐ **Assign a healthcare power of attorney.**	Designate someone you trust to make medical decisions on your behalf if needed.
☐ **Discuss your wishes with loved ones.**	Clear communication helps avoid confusion or conflict later.

APPOINT TRUSTED REPRESENTATIVES

☐ **Name a financial power of attorney (POA)**	Ensure someone can handle your finances if you're unable to.
☐ **Select responsible executors or trustees.**	Choose individuals who will follow your instructions faithfully.
☐ **Periodically review your choices.**	Reassess these decisions as relationships and circumstances change.

DESIGNATE YOUR BENEFICIARIES

☐ **Review all beneficiary designations.**	Check retirement accounts, life insurance, and transfer-on-death accounts—these override your will.
☐ **Consider including the Naval Academy Foundation.**	Naming the Foundation as a beneficiary of your IRA or retirement account is simple and impactful.
☐ **Ensure consistency across your documents.**	Make sure your beneficiary forms align with your overall estate plan.

REVISIT YOUR PLAN REGULARLY

☐ **Review your plan every 3–5 years.**	Update your documents after major life events like marriages, births, or relocations.
☐ **Consult with trusted advisors**	Work with estate attorneys, tax advisors, and financial planners to keep everything current.
☐ **Stay focused on your legacy**	Small updates today make a world of difference tomorrow—for your family and the causes you care about.

UNITED STATES NAVAL ACADEMY
ALUMNI ASSOCIATION AND FOUNDATION

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