Equine Estate Planning Checklist

This printable Equine Estate Planning Checklist helps horse owners and barn managers gather items for estate planning on a horse farm. Print a fresh copy as needed and keep completed pages with your other barn records.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
List of assets	☐	☐	☐
Horses and registrations	☐	☐	☐
Land and buildings	☐	☐	☐
Business documents checked and noted	☐	☐	☐
Will and trusts reviewed	☐	☐	☐
Beneficiary designations checked and noted	☐	☐	☐
Care instructions for horses	☐	☐	☐
Contacts of advisors	☐	☐	☐
Digital accounts checked and noted	☐	☐	☐
Location of papers	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Confirm each item with a licensed attorney and a tax professional or the agency.