



Transition Planning Starter Checklist

This document is provided by Estate Exotics as a professional starting point to help you organize essential information regarding your exotic or collector vehicle. It is a personal planning worksheet and does not require signatures or formal approval.

1. Vehicle Basics

Vehicle Make: _____

Model / Trim: _____

Model Year: _____

VIN: _____

Title Location: _____

Primary Key Location: _____

2. Important Documents

Service Records Location: _____

Purchase Documentation Location: _____

Insurance Carrier: _____

Policy Number: _____

3. Personal Direction

If something were to happen, I would prefer the vehicle to be: Kept / Sold / Executor's Decision

If sold, preferred timing: Immediate / Within 3–6 Months / One Year or More

