

Estate Planning Worksheet

Let's identify the areas you would like to learn more about:

- Protecting Yourself or Partner
- Protecting Child or Beneficiaries
- Preserving Assets
- Achieving Dreams
- Philanthropic Endeavors

Important questions to think about:

I/We have _____ Child(ren) with name(s) _____

I/We want _____ to be the guardian of our child(ren)

If you have any pets you want taken care of, please name a guardian _____

Do you need to protect anyone with special needs? ___ Y ___ N

Have you thought about who could make final decisions for you? Have you thought about a back-up person or entity if they cannot serve? (This is also known as a Personal Representative/Executor or Trustee) 1st choice _____ 2nd choice _____

Who would you want to make financial decisions for you? (This is also known as a Trustee or Power of Attorney) Name of Spouse/Partner/Trusted Person/Entity _____

Who would you want to make decisions for you with regard to your medical treatment? (This is called Healthcare Proxy or Healthcare Power of Attorney)

Name of Spouse/Partner/Trusted Person/Entity _____

After your death, who could manage and distribute your assets to your beneficiaries?

Name of Spouse/Partner/Trusted Person/Entity _____

Think about how you would like your Advanced Healthcare Directives to operate? In the simplest terms, would you like your life prolonged through maximum treatment, or not prolonged at all.

Would you want to be tube fed if possible? ___Y___N

Think about if you were in a vegetative state. What would you like to happen next?

Do you have a HIPAA in place? ___Y___N

What if you had a terminal condition. What would you like to happen next?

What would you like to happen if you are unable to make decisions based on mental health?

Would you like to plan for long term care or disability? ___Y___N

Do you want to provide your organs and tissues for transplant purposes? ___Y___N

Do you want cremation? ___Y___N

How would you like your funeral and burial plans to be?

I/We would like to direct our debts to _____ after death.

Do you own any assets you'd like to pass along or protect? ___Y___N

Assets would include, but are not limited to the following. Circle all that apply.

Real Estate

Furniture and Personal Effects

Income

Property

Bank and Savings Accounts

Stocks and Bonds

Life Insurance and Annuities

Retirement Plans (401k, IRA, etc.)

Business Interests

Money Owed To You

Anticipated Inheritance

Government Benefits

Special Gifts

How would you like to protect and distribute your assets above? _____

Who or What would you like to distribute your assets to? _____

What type of planning documents are you interested in learning more about? Will Trust LLC

Do you need special Asset Protection? Y N

Are you familiar with Probate? Y N

At a minimum, every adult should have a Durable Power of Attorney, Healthcare Directives, Healthcare Power of Attorney and Living Will written and in place, in the event of your incapacity. They are simple documents that can be drawn up and notarized. Some of your wishes may need to be protected more through the security of a Trust or LLC. If you need help deciding between a Trust or Will, ask yourself the questions below to see if a Trust is the right fit for you.

Would you like to maintain privacy of your wishes? Y N

Do you own any assets you'd like to protect? Y N

Would you like total control over your assets, and make changes over time? Y N

Do you want to your loved ones to avoid the probate court and process at your death? Y N

In the event your children/loved ones get sued, divorced or have creditor issues, do you want the inheritance you pass to them to be protected? Y N

In the event the survivor of you or your spouse remarries, do you want to ensure you children receive their inheritance? Y N

Do you wonder if a Will is strong enough to protect your wishes? Y N

If you answered "yes" to any questions on the above section, a Trust might be a better option to preserve your wishes.

Bring Your Planning Worksheet To Your **FREE Consultation. Call Us Today!**

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