

Estate Planning Worksheet

If you are married and become incapacitated, will your spouse always serve in the first position to make your decisions?

YES or NO

If you have minor children, which individuals would you trust to take care of your minor children, if you can't care for them or are deceased? N/A

1.

2.

3.

Who should oversee and manage the money you've left your children until they reach the designated age? N/A

1.

2.

3.

How old should your minor children be before they handle money you've left them, if you're deceased? (The money can be accessed by your trustee for your children's needs until they take over at the designated age.)

Which individuals would you trust to handle your finances should you become disabled?

1.

2.

3.

Which individuals would be best to speak to your doctors and handle your major medical decisions?

1.

2.

3.

Which individuals would handle your estate and pay your final bills and expenses at your death?

1.

2.

3.

Estate Planning Worksheet

Do you wish to be kept alive by artificial means if you can no longer communicate and a licensed physician deems that you are at the end stage of a disease which will take your life within a short period of time?

YES or NO

Do you want your health care agents to consult with the doctor before a final decision is made regarding your end of life care?

YES or NO

Which do you prefer?

BURIED or CREMATED

Do you wish to be an organ donor?

YES or NO

Is your estate (life insurance, IRA's, 401ks, real estate, bank accounts, business interests, etc.)

Less than \$500,000?

More than \$500,000?

Use the space below to name the people who will receive something from you when you die and what each person will receive. Use percentages.

Other questions for the attorney?