

Estate Planning Check List

If you are ready to plan for whatever the future may bring, start by answering the following questions.

- When answering below, name three levels of people, in case some are unavailable or circumstances change.
- Circle the answers which resonate with you the most.

If you're married, will your spouse always serve in the first position?

Yes

No

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

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

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

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

N/A

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

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.)

Age:

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 or cognitive illness such as Alzheimer's or Parkinson's?

Yes

No



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If you do not wish to be kept alive by extraordinary means, do you want to receive artificial hydration, artificial nutrition, or both artificial nutrition and hydration?

No

Yes, to artificial hydration

Yes, to artificial nutrition

Yes, to both artificial nutrition and hydration

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

No

Which do you prefer?

Buried

Cremated

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 and/or organizations who will receive something from you when you die AND what each person will receive. Use percentages!

What questions do you have for the attorney?



An estate plan should be prepared while you are in good health physically and mentally and in a position to consider its provisions carefully.

Putting off making an estate plan can have disastrous results. In the event of incapacity, the Court will decide who will serve as your guardian, and it may not be who you would want.

Moreover, without an estate plan, your property will be distributed to your heirs as set out in the state statute. Your estate may not be distributed to the people you want, when you want.



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