



Estate Planning & Elder Law • Wills • Trusts • Estate Administration & Probate

Throughout your estate plan there will be opportunities to make important decisions that may impact you and your assets down the road.

For example, if the time comes when you cannot make decisions for yourself, someone will have to make them for you. Through careful Estate Planning, however, you have the ability to decide ahead of time who that person will be.

Answering the questions on this worksheet will get you started making important estate planning decisions. If a question asks for three people, circle the person who would be your first choice.

If you are married, do you want your spouse to make decisions for you in the event of your incapacity? Yes No

If you are unmarried, or do not wish your spouse to make decisions for you, name three people you would want to make health care decisions for you if you are incapacitated.

1. _____
2. _____
3. _____

Name three people you would trust to handle your assets and make financial decisions for you if you are incapacitated.

1. _____
2. _____
3. _____

Who would you want to handle the administration of your estate after your death?

1. _____
2. _____
3. _____

If you have minor children, who would you trust to care for them if you were unable to because of incapacity, or in the event of your death?

1. _____
2. _____
3. _____

Since your minor children cannot inherit directly from your estate, who would you trust to manage their inheritance until they reach the age at which they can inherit directly?

1. _____
2. _____
3. _____





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Do you want your children to inherit a lump sum when they are old enough or do you prefer staggered disbursements?

Yes No

Legally, your children can inherit directly at age 18; however, how old do you want your children to be before they receive a direct disbursement?

If a licensed physician declares that you are permanently unconscious, or are suffering from an incurable and irreversible illness, disease, or condition, do you wish to be kept alive by artificial means? Yes No

Do you want to be an organ donor?

Yes No

Do you already have a funeral and burial contract in place? Yes No

If yes, what is the name of the funeral home?

If no, do you wish to be cremated or buried?

Do you believe that the total value of all your estate assets is more than \$500,000? Yes No

Name the people, charities, or other beneficiaries to whom you wish to leave gifts from your estate. Next to each beneficiary, include a percentage of the total estate value or, if you wish to leave specific gifts, note the major gifts you wish to leave that beneficiary.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

What other questions do you have for the attorney?