

Future Care Planning Series: Estate Planning Essentials

Estate Planning Attorney Worksheet

The Money People™

List the person(s) who you want to consider for the future job of managing financial decisions for you.

Order Complete with Attorney	Name	Address	Relationship

The Future Care People™

List the person(s) who you want to consider for the future job of making medical decisions for you (i.e., Power of Attorney for Medical Decisions).

Order Complete with Attorney	Name	Address	Relationship

Guardianship/Conservatorship

List the person(s) who you want to consider for the future job of guardian of your minor child.

Order Complete with Attorney	Name	Address	Relationship

The Asset Split

List the person(s) or charities to whom you want to leave your estate.

Percent Complete with Attorney	Name	Address	Relationship

Other Important Information
