

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	Name	Address	Relationship
Complete with Attorney			

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	Name	Address	Relationship
Complete with Attorney			

Guardianship/Conservatorship

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

Order	Name	Address	Relationship
Complete with Attorney			

The Asset Split

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

Percent	Name	Address	Relationship
Complete with Attorney			

Other Important Information