Future Care Planning Series: Estate Planning Essentials

Estate Planning Attorney Worksheet How-To Guide

Understanding your Estate Plan is a critical step in creating your Future Care Plan. Completing this worksheet will help you determine your “money people,” your “care people,” and how your assets should be distributed.

Please follow the steps below to complete your **Estate Planning Attorney Worksheet.**

Step 1: Identify Your “Money People”

- **Brainstorm:** Think about people you know who are organized, trustworthy, and good with finances.
- **List:** Write their names down.
- **Evaluate:** Circle the top three choices you feel are best suited to make financial decisions on your behalf.
- **Rank:** Order them 1, 2, and 3.

Step 2: Identify Your “Care People”

- **Brainstorm:** Think about people you know who are caring, understand your values, and can make difficult medical decisions.
- **List:** Write their names down.
- **Evaluate:** Circle the top three choices you feel are best suited to oversee your personal and medical care.
- **Rank:** Order them 1, 2, and 3.

Step 3: Identify Future Guardians or Conservators

- **Brainstorm:** Think about people you know who are both caring and responsible.
- **List:** Write their names down.
- **Evaluate:** Circle the top three choices you feel would best ensure the future care and safety for your loved one.
- **Rank:** Order them 1, 2, and 3.

Step 4: Determine the Asset Split

- **List Beneficiaries:** List every person you would like to include in the distribution of your estate.
- **Identify Charities:** List any organization(s) you would like to support with a donation.
- **Allocate Percentages:** Assign a percentage to each person or group to indicate how you might distribute assets.
- **Consider Needs:** Acknowledge that a portion left to a loved one with special needs may need to be larger to reflect their greater long-term financial requirements,

Prepare for Your Meeting: Use this worksheet as a starting point to discuss your priorities and the relative importance of each beneficiary with your attorney.

For more information about completing your Estate Planning Attorney Worksheet, please watch the Estate Planning Essentials webinar