

Future Care Planning Series: Estate Planning Essentials

Estate Planning Dream Team Worksheet

How-To Guide

Understanding your Estate Plan is a critical step in creating your Future Care Plan. Completing the Estate Planning Dream Team Worksheet will help you build a comprehensive support system for your loved one by identifying and listing key players in every area of their life.

Please follow the steps below to complete your [Estate Planning Dream Team Worksheet](#).

Step 1: Identify Your Key Categories

Recognize that this is an ongoing process; your team will evolve over time. Start by identifying the main areas of support your loved one needs.

Consider using sub-categories to stay organized:

- **Medical:** Specialists, Dentists, Primary Care, Optometrists, and Therapists.
- **Social and Community:** Recreational groups, religious affiliations, and vocational support.
- **Professional:** Attorneys, financial planners, and trust officers.
- **Action:** Whenever you identify a person or group that is (or will be) important to your loved one's well-being, add them to the worksheet.

Step 2: Document Detailed Information

For every team member identified, list their full contact information, including:

- Name of the individual and/or organization
- Phone number and email address
- Specific role or service they provide

Step 3: Establish a Review Schedule

- Circumstances change, and your Dream Team should, too. **Set a Date:** Choose an easy-to-remember "anniversary date" (such as a birthday or the start of the year) to review and update your worksheet annually.

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Step 4: Centralize Your Data (My Special Life)

Use this worksheet as a primary tool to input information into your My Special Life workbook, ensure all transition and care documents are synchronized.

**For more information about completing your Estate Planning Dream Team Worksheet,
please email asf@protectedtomorrows.com**

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