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.

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