

Get Your Ducks in a Row: Estate Planning

Utilize this worksheet to help you through the estate planning process. This worksheet will guide you through how to prepare for the unexpected so your loved ones can work through your financial affairs with less overwhelm and provide you with the utmost peace of mind. Provide a copy to your executor for safe keeping.

Key Terms:

- **Last Will & Testament:** A will is a legal document that communicates a person's final wishes pertaining to their assets.
- **Payable on Death:** A Payable on Death (POD) is beneficiary designated by the owner(s) of the account to receive the balance of funds when the last owner on the account passes away.
- **Power of Attorney:** A power of attorney is a legal authorization that gives a designated person the power to act for someone else.
- **Trust:** A trust is a legal arrangement established by an individual (the grantor) during their lifetime to protect their assets and direct their distribution after the grantor's death.
- **Funeral Planning Declaration:** Funeral Planning is the act of making arrangements for final disposition, including a funeral, cremation, memorial, ceremony or other service/plans prior to death.

Property:

Current Home

Land/Lot

Investment Property

Address	Value	Notes

Documents to Visit:

- Last Will & Testament
- Trust Documents
- Power of Attorney (Financial)
- Power of Attorney (Healthcare)
- Payable on Death
- Funeral Planning

Document	Date Drafted	Dated Signed	Date Revised

Key Contacts:

Name	Title	Phone Number	Notes

Accounts:

Savings

Checking

Certificates

Money Markets

Retirement Accounts

Other Investments

Financial Institution	Type of Account	Account Titling	Date Revised

Assets:

Electronics

Jewelry

Furniture

Safety Deposit Box

Collateral (Boat, RV, Vehicles, etc.)

Item	Value	Notes

Insurance:

- Life Insurance
- Dependent Insurance

- Vehicle Insurance

- Renters/Home Insurance

Company Name	Phone #	Policy Dates

Debts Owed:

- Home Loans
- Vehicle Loans

- Personal Loans
- Credit Cards

- Secured Loans
- Other Loans

Company Name	Phone #	Type of Debt

Passwords:

- Bank Accounts
- Email Accounts
- Medical Accounts

- Bill Payer
- Utility Accounts
- Credit Card Accounts

- Loan Accounts
- Social Media
Accounts

Company	Username	Password

Notes:
