

Simple Pre-Estate Planning Worksheet

Powers of Attorney - Financial

List up to four candidates to manage your finances if you are unable to act on your own behalf:

- 1)
- 2)
- 3)
- 4)

Powers of Attorney – Medical and Mental Health

List up to four candidates to make your medical decisions if you are unable to communicate:

- 1)
- 2)
- 3)
- 4)

Guardians for Dependent Children

List up to four guardians to raise any dependent children under age 18 should you pass:

- 1)
- 2)
- 3)
- 4)

Primary Beneficiaries

List percentages and names for primary beneficiaries:

| Percentage | Name |
|------------|------|
| 1) % | |
| 2) % | |
| 3) % | |
| 4) % | |
| 5) % | |
| 6) % | |

Contingent Beneficiaries

Would you like a deceased beneficiary's share to go to his or her own children? Y / N

Should a deceased beneficiary with no children has his or her share split among the remaining beneficiaries? Y / N

List percentages and names for contingent beneficiaries and include any special notes:

| Percentage | Name |
|------------|------|
| 1) % | |
| 2) % | |
| 3) % | |
| 4) % | |
| 5) % | |
| 6) % | |

Specific Assets for Distribution

List titled assets (vehicles, real estate or other accounts) to be distributed to specific people. Do not list personal items (jewelry, etc) at this time:

Executors / Personal Representatives and Trustees

List up to four candidates to manage your estate after you pass (if these people are the same as your financial power of attorney agents, write "Same as Fin POAs" below):

- 1)
- 2)
- 3)
- 4)

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These worksheet pages are not a substitute for legal documents.

Identify and Prioritize Estate Planning Needs and Goals

Rank your current needs and goals using 1 (Lowest) through 5 (Highest). The same ranking can be given to multiple goals:

- _____ Appoint agents for medical and financial powers of attorney
- _____ Asset protection from lawsuits
- _____ Loss of income due to disability
- _____ Long-term care costs
- _____ Increase the size of an estate
- _____ Provide money for surviving dependents
- _____ Appoint guardians for children
- _____ Control distributions to young beneficiaries
- _____ Provide for a special needs beneficiary
- _____ Maintain a residence for a spouse, children or other family to use
- _____ Provide for pets
- _____ Reduce the likelihood of a contested estate
- _____ Avoid probate
- _____ Reduce or avoid estate taxes (in 2012 estates valued currently at \$5.12M are potentially subject to estate taxes; in 2013 estates valued at \$1M are potentially subject to estate taxes)
- _____ Other:

- _____ Other: