



Four Peaks Planning, Inc.

Pre-Estate Planning Worksheet

Congratulations!

You have taken the first step towards estate planning by researching our website and downloading our Pre-Estate Planning Worksheet.

Use the following pages to identify estate planning goals and prepare a list of potential candidates to fulfill various roles in your plan. Remember that estate planning is an ongoing process and that as your life changes you may desire to update your documents, which is possible with revocable documents.

When you sit with us for a complimentary consultation, we'll review your goals and choices below. We will also review sample estate planning documents to help you visualize the implementation of your estate plan.

There is no need to prepare a list of contact information or a list of assets at this time. That information will be needed at a later point by those you have appointed to manage your estate upon your incapacitation or passing, but it will not be needed to create your documents.

When you are ready for a free 90 minute consultation at our office in Ahwatukee or in your home, whichever is more convenient, please call. Evening and weekend appointments are available if needed.

Once you have finished, like all our clients you will feel relieved to have completed this task and we are confident you will be more than satisfied with the estate planning documents we prepare for you!

Sincerely,

Jamie Kahn

Owner of Four Peaks Planning, Inc. – Established 2004



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 2013 estates valued currently at \$5.25M for an individual, \$10.5M for a married couple are potentially subject to estate taxes), though these values can change in the future.
- _____ Other:

- _____ Other:



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Powers of Attorney - Financial

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

SPOUSE 1	SPOUSE 2
1)	1)
2)	2)
3)	3)
4)	4)

Powers of Attorney – Medical and Mental Health

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

SPOUSE 1	SPOUSE 2
1)	1)
2)	2)
3)	3)
4)	4)

Guardians for Dependent Children

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

- 1)
- 2)
- 3)



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? Yes / No

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

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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Questions and Additional Notes: