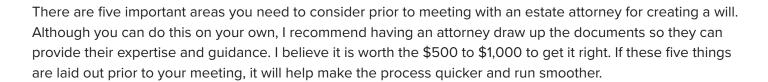
Estate Planning

PRE-WORK



STEP 1 - CHILDREN		
If you have minor children:		
■ Who is going to take care of them?		
■ Where will they be going?		
■ Will they be moving? □ YES □ NO		
Other changes, like schools, etc?		
■ Will there be a need to help pay for this care? □ YES □ NO		
■ Supplemental income to their caregivers? □ YES □ NO		
■ If yes, how much?		
STEP 2 - MONEY		
■ Where do you want your money to go?		
■ Directly to your heirs? □ YES □ NO		
■ Trust? □ YES □ NO		
■ Living Trust □ YES □ NO		
■ Testamentary Trust □ YES □ NO		
■ How/when do you want them to receive the money?		
■ Is there a special needs child to care for? □ YES □ NO		
STEP 3 - POWER OF ATTORNEY		
■ Who will act on your behalf for financial purposes in the event of your incapacitation?		

STEP 4 - HEALTH CARE POWER OF ATTORNEY

Who will act on your behalf for healthcare purposes in the event of your incapacitation?

Consider and discuss your wishes and share them with your family to make sure they understand. This will be included in your Last Will and Testament.

STEP 5 - BENEFICIARIES

Who are your primary	peneficiaries?	
, ,		

Do you have any contingent beneficiaries?	LI YES LINO
If yes who?	

■ Check to see that your accounts/policies reflect the beneficiaries, primary and contingent, you listed.

☐ Life Insurance Policies

□ 401(k)

☐ IRAS

☐ Brokerage Accounts (ex. Joint Account, Individual Account)

☐ Anything else that you may have that has a Beneficiary Designation available.

Now that you have completed the worksheet, seek the advice of an attorney, and put these items into writing. It may be difficult to think about some of these things but it will give you peace of mind to know that your family has clear directions about your wishes.