

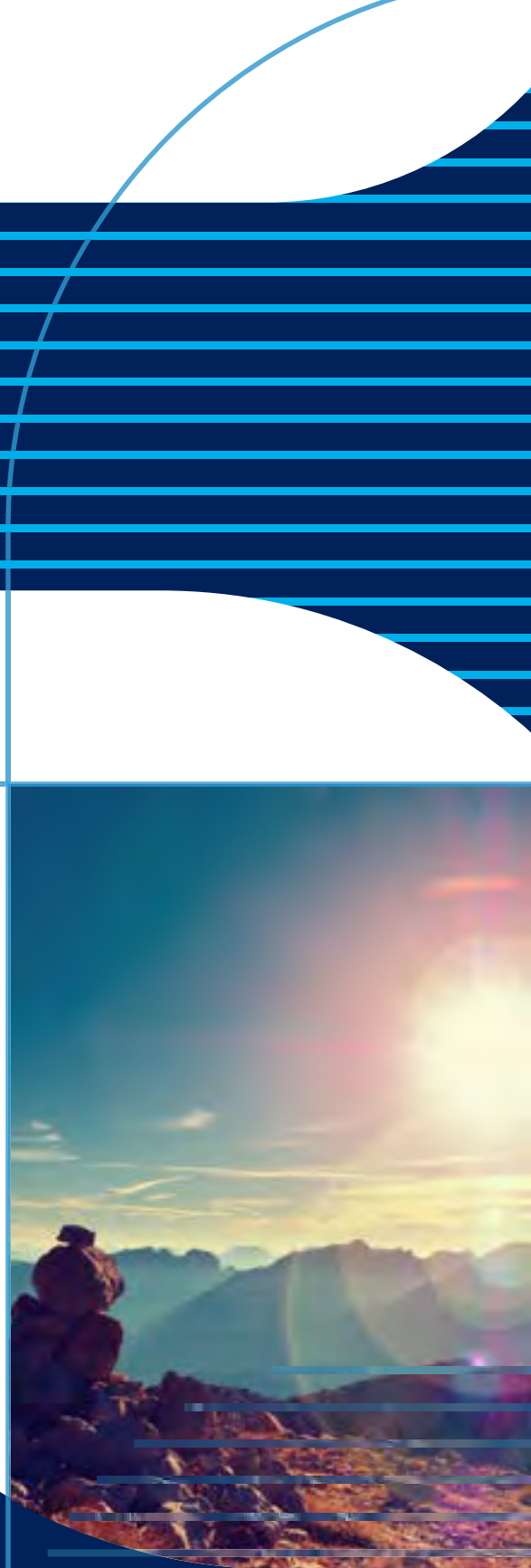


# Still Living On, Long After You're Gone

Giving Your Family Peace of  
Mind When They Need it Most

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**\*Please note that legally notarized documentation is still required for a proper estate plan. This resource is meant simply to be a guide to ease the transition for your family members, and it is not legally binding.**



## The Importance of an Estate Plan

No one likes to talk about estate planning. And trust us. We get it. It's a conversation typically centered around the question of, "What will I do when the person I love, trust and rely on the most is no longer with us?" Why wouldn't someone want to take that question and push it into the deepest recesses of their mind, hoping they'll never have to access those thoughts. Unfortunately, the fact is, it's one of the most important conversations to have, and it can save you and your family from not just paperwork, but time, financial and emotional burdens.

That's why we believe the conversation is well worth it, because you can never be too prepared for the future. We also recommend opening the conversation early. When thinking about something as ominous and dark yet definite as death, it can be helpful to strategize when it's still years or decades away. We tend to process the long-term tragedy much better, as we can't always fully grasp the weight of decades. We also think it's important to approach it as a hypothetical. Think about what you would do if something were to happen, not when it happens. Furthermore, know that you're constructing an estate plan out of an abundance of care and desire to do right by everyone. The goal is to create a feeling of peace and a firm belief that if something were to happen, everything would eventually be okay.

### Our Why

We started our firm to help give our clients more time in their daily lives to focus on what's important to them. We also aim to eliminate the many stressors of life with a plan for the future, displacing the burden that can come with uncertainty. Our focus on estate planning is one way we believe we can help our clients avoid the strain of losing a loved one. Of course, it will always be painful to lose someone you love, but an estate and legacy plan can prevent you from continuing to be traumatized by the ancillary responsibilities that come with death. It can also save you from expensive and timely probate courts, which don't have your best interests in mind. Our fiduciary responsibility calls for us to act exclusively in your best interests, looking for advantageous opportunities for both the protection and growth of everything you prioritize. This is yet another tool in our toolbox to help you achieve your financial goals, and we want to put our estate planning services to work for you.

### Finding Your Why

Your "Why" is key to everything we do from a planning perspective. It starts with your short- and long-term goals and extends to the objectives of your individual family members, your beneficiaries, the organizations you care about and more. When we initiate the conversation about an estate plan, we'll focus heavily on your why, which is the reason you're assembling a plan that works to help provide a seamless transition of your assets. We'll discuss the people who are important to you and what you'd like them to receive if you were to pass unexpectedly.

We'll also discuss your financial goals and how you want to be seen once you're gone, because your image will be changed by the way you plan for your passing. For example, any of your assets with personal value could be used as a token of remembrance for your family members, or your funds may be used to help the causes you care about pursue a better future. Additionally, maybe your estate plan will help you push your business forward and hand the reins to someone who supports and believes in your vision. We can work with you to find your "Why." Then, we'll use it as the focal point of our plan, making each and every decision in the name of bringing it to life.



# About My Life

## My Information

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Country: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_ Secondary Phone Number: \_\_\_\_\_

Primary Email: \_\_\_\_\_ Secondary Email: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

## My Spouse's Information

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Country: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_ Secondary Phone Number: \_\_\_\_\_

Primary Email: \_\_\_\_\_ Secondary Email: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

## My Children's Information

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_



# My Network

## Professional Connections for My Personal Finances

Attorney: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Accountant: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Financial Consultant: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Insurance Agent: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Bank: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Bank: \_\_\_\_\_ Phone Number: \_\_\_\_\_

## Other

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

## Professional Directives:



## More Information About My Family

### My Parents

Father's Full Name: \_\_\_\_\_ DOB: \_\_\_\_\_ City, State of Origin: \_\_\_\_\_

Primary Email: \_\_\_\_\_ Secondary Email: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Date of Death (If Applicable): \_\_\_\_\_ Burial Site, City and State: \_\_\_\_\_

Mother's Full Name: \_\_\_\_\_ DOB: \_\_\_\_\_ City, State of Origin: \_\_\_\_\_

Primary Email: \_\_\_\_\_ Secondary Email: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Date of Death (If Applicable): \_\_\_\_\_ Burial Site, City and State: \_\_\_\_\_

### My Siblings

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

### My Grandchildren

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_



# My Obligations

## Marital and Family Obligations

	Yes	No
Do you make time-based payments based on property settlements or divorce agreements?		
Did you and your spouse sign a pre-marital or post-marital agreement based on assets?		
Are you or your spouse physically disabled or in need of specialized care?		
Have you ever been divorced?		
Has your spouse ever passed away while married?		
Do you have any children or declared beneficiaries who are physically disabled or in need of specialized care?		
Are you currently or have you ever been the beneficiary of someone's trust?		
Do you, your spouse or your children currently receive support from the government?		
Are any of your dependents or immediate family members institutionalized?		
Do you have any adopted children?		
Do you claim any dependents or beneficiaries who are not related to you?		
Are you a veteran of the United States Military? (Army, Marines, Navy, Air Force, Coast Guard, Space Force)		

If you answered "yes" to any of these questions, please provide more details:



## Business Obligations

	Yes	No
Do you currently own a business, or have you owned a business in the past?		
Have you ever filed for a gift tax return from the federal or state government?		
Are you or your spouse physically disabled or in need of specialized care?		
Do you have any children or declared beneficiaries who are physically disabled or in need of specialized care?		

If you answered "yes" to any of these questions, please provide more details:

## My Wishes

### My Will

My last will and testament is currently located: \_\_\_\_\_

I have granted medical power of attorney to: \_\_\_\_\_

I have granted financial power of attorney to: \_\_\_\_\_

In the event of my death, you should consult: \_\_\_\_\_

### My Burial

I would like for my remains to be: \_\_\_\_\_

In the event of my death, I wish to donate the following organs: \_\_\_\_\_

Preferred Cemetery: \_\_\_\_\_ Preferred Casket: \_\_\_\_\_

Preferred Headstone: \_\_\_\_\_ Epitaph: \_\_\_\_\_

I would like for my service to be held at: \_\_\_\_\_

I would like for my service to follow the customs of the following religion: \_\_\_\_\_

Other Requests (Pall Bearers, Music, Flowers, Ideas, etc.):



# My Beneficiaries

## The Importance of Beneficiaries

This is likely the reason you're assembling an estate plan in the first place. Your beneficiaries are set to inherit your assets, making this a key component of your estate plan. Additionally, it's important to consider not just which assets will be bequeathed to whom, but how your individual beneficiaries will receive those assets. This resource will help you establish directives for the distribution of your assets that can help you prevent conflict, infighting and legal battles, none of which are unheard of in even the most agreeable family members. It can also direct that your assets go exactly where you intend for them to go, ideally with tax advantages. Distinguish your beneficiaries below to offer some guidance toward clarity.

### Special Gifts

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:

### Beneficiaries

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:



**Ultimate Beneficiaries**

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:

Name of Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Address: \_\_\_\_\_

Description of Gift:



# Building Your Legacy

## Circling Your Objectives

Just as each person varies, so do their unique estate plans. They will be created with different goals for different people and different methods of providing direction and protection. Now, it's time to assess your own goals. What are you trying to accomplish as you construct an estate or legacy plan that eases your family's transition? Additionally, what makes your estate plan unique? No two people hold the same assets or have the same family dynamics. These will vary from person to person, and a properly structured estate plan can ensure that your individual needs are met to suit your objectives and protect your family the way you always intended. Here are a few ways an estate plan can be leveraged to help beneficiaries and surviving family members.

## Tax Preservation and Maximization of Assets

Estate plans can be used to help preserve your funds from excessive taxation and potentially minimize estate taxes, which can take a heavy toll on the amount inherited by your loved ones. It can also help you reduce the costs of expensive probate courts or avoid them altogether. You've worked hard to accumulate your assets. You should be able to determine whom they go and how they get there, and you deserve a say in how they are used to give your beneficiaries a better chance to financially recover from your passing or incapacitation.

## Protection

Your assets belong to you. They shouldn't be subject to disbursement to different payees looking to get their cut of your funds. That can include doctors, lawyers, accountants, probate courts, medical facilities and more who never understood your goals and don't have your wishes in mind. Through establishing your chosen beneficiaries or opening a living trust that can shield your assets from predatory parties simply looking for an opportunity to gain, your plan can give your beneficiaries a fighting chance to retain your precious assets. We can help you establish a trust and accompanying documents to defend your wealth.

## Benefits for Beneficiaries

For those who are simply looking for a way to protect beneficiaries and offer them greater benefits after passing, an estate plan can be the perfect way to do so. Obviously, the estate plan can dictate how assets are transferred, but it can also protect them from excessive taxation, or it can offer direction for the timing and method of their distribution. Furthermore, it can save loved ones from both work and heartache in the aftermath of your death. Without proper documentation, they could be subject to the pain of dealing with probate courts or more as they try to distribute treasured items.

## Leaving a Legacy

While it's important to establish your estate plan for your beneficiaries, it can also help you create a legacy and be remembered the way you'd like to be. For example, maybe you have philanthropic wishes you'd like to see fulfilled, or you'd like to contribute to a cause that you can see making a difference in the world or in the lives of those you care about. Your estate plan can outline your efforts to contribute to those causes, giving you even more autonomy when it comes to the way your assets are used following your passing.

PCIA and its associates do not provide legal or tax advice. Individuals should consult with an attorney or professional specializing in the fields of legal, tax, or accounting regarding the applicability of this information for their situations.



## Roles to Fill

### Who Do You Trust?

As part of your estate plan, you must determine who will fill each role should you no longer be able to make decisions on your own behalf or if you pass. As we know that not everyone has a large circle of peers or family members they'd hand this level of responsibility to, you don't need different people for every role, but some trusted confidants may be better suited for different roles. Please try to imagine each person in your life in these roles as you gauge their ability to address your needs and carry out your vision for the future.

### Disability Panel

Your disability panel is in charge of determining whether or not you are able to continue making decisions for yourself. For example, if you become mentally disabled, they can decide if you're still capable of being in charge of your property, your finances and your medical condition. It's important to remember that your disability panel is not granted powers of attorney. It simply protects your power and keeps your future out of the hands of a living probate court. It can also include family members, friends and medical professionals. A combination helps to legitimize the decision.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Additional Information: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Additional Information: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Additional Information: \_\_\_\_\_

### Disability Trustees

Should you no longer be mentally capable of making decisions for yourself, your disability trustees become the trustees of your trust. This is important as they will gain all decision-making power over your trust and the assets inside it; however, they will be required to follow any directives you have provided in the event that you can no longer act as the trustee. As this role comes with major responsibilities, we recommend selecting individuals whom you trust to carry out your vision. We also advise selecting multiple trustees who understand your goals and can work together to assume your position.

Primary Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Additional Information: \_\_\_\_\_



Alternate Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**General Agents**

Your general agents will be designated power of attorney, which is complete financial decision-making power if you are determined by either your disability panel or living probate to be mentally incapable of making sound financial and medical decisions. In addition to your trust, these agents can be in charge of your investment accounts, retirement accounts, pension plans, liquid assets and more. Again, it’s important to assign someone this role if you trust that they will uphold your vision for your financial future and act in your best interests. It can also be helpful to have an overlap between your general agents and your disability trustees. Oftentimes, unified ideas are better, especially in this arena.

Primary General Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate General Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate General Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**Funding Agents**

Your funding agents, like your disability trustees, work within your trust, and they are granted the power to transfer your assets into your trust. This allows you to designate someone to carry out your wishes for your trust should the need arise, potentially granting the power to quickly move assets in an emergency. This can include real estate, cash and similar assets, securities, and more, potentially opening the door for tax-advantaged transition of funds.

Primary Funding Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_



Alternate Funding Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Funding Agent: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**Guardian**

Whereas your disability panel, trustees and agents are responsible for financial decisions, your guardian is responsible for health care decisions should you be deemed incapable of making informed decisions about your health. Ideally, this person knows your preferences in terms of care, whether that be from a financial, religious or scientific perspective. Ideally, you have otherwise established a health care power of attorney, but listing and designating guardians can help you if the unexpected arises.

Primary Guardian: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Guardian: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Guardian: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**Conservator**

Conservators oversee your property if living probate or the disability panel determines that you are no longer able to make financial decisions on your own behalf. This is particularly key if the unexpected occurs and you are no longer capable of handling personal matters in a matter of moments. You conservator, or conservators, can step in and manage your personal affairs as your most trusted party.

Primary Conservator: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Conservator: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_



Alternate Conservator: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**Settlement Trustees**

Your settlement trustee can help you cover any outstanding debts and make decisions to protect your funds if you can no longer defend them yourself. This person also has a fiduciary duty to act in your best interest when managing your trust assets, and they are legally bound to follow any written directives you may have left. In this case, it's important to clearly outline, in writing, your wishes. It can be helpful to work with your estate planning attorney to ensure that these wishes are unambiguous and easy to follow, giving your settlement trustees the best possible chance to do their duty.

Primary Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Trustee: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

**Executor**

Your executor is responsible for decisions regarding any of your assets that are not held by your trust. For example, if you have a last will and testament, your executor can ensure that the assets designated to your beneficiaries are granted to them without delay. It's important to ensure that this person understands your vision, as they will be in charge of executing your wishes upon your death.

Primary Executor: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Executor: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_

Alternate Executor: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Additional Information: \_\_\_\_\_



# My Assets

## Cash, Checking, Savings, etc.

Asset Type: \_\_\_\_\_ Holding Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Holding Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Holding Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Holding Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Holding Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

## Retirement and Employer-Sponsored Plans

Asset Type: \_\_\_\_\_ Employer/Custodian: \_\_\_\_\_

Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Employer/Custodian: \_\_\_\_\_

Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Employer/Custodian: \_\_\_\_\_

Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Employer/Custodian: \_\_\_\_\_

Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Employer/Custodian: \_\_\_\_\_

Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

## Pension Plans

Employer: \_\_\_\_\_ Account Owner: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Death Benefit: Yes | No

Employer: \_\_\_\_\_ Account Owner: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Death Benefit: Yes | No

Employer: \_\_\_\_\_ Account Owner: \_\_\_\_\_

Estimated Value: \_\_\_\_\_ Death Benefit: Yes | No



**Investment Accounts**

Asset Type: \_\_\_\_\_ Account Custodian: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Account Custodian: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Account Custodian: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Account Custodian: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Account Custodian: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

**Real Estate**

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Original Value: \_\_\_\_\_  
Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
Amount Owed: \_\_\_\_\_ Pay-Off Date: \_\_\_\_\_ Insurance Info: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Original Value: \_\_\_\_\_  
Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
Amount Owed: \_\_\_\_\_ Pay-Off Date: \_\_\_\_\_ Insurance Info: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Original Value: \_\_\_\_\_  
Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
Amount Owed: \_\_\_\_\_ Pay-Off Date: \_\_\_\_\_ Insurance Info: \_\_\_\_\_  
Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Original Value: \_\_\_\_\_  
Street Address: \_\_\_\_\_ Apt., Suite, etc.: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_  
Amount Owed: \_\_\_\_\_ Pay-Off Date: \_\_\_\_\_ Insurance Info: \_\_\_\_\_

**Insurance Policies & Annuities**

Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_  
Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_  
Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_  
Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_  
Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_  
Policy Type: \_\_\_\_\_ Carrier: \_\_\_\_\_ Policy Number: \_\_\_\_\_  
Insurance Agent: \_\_\_\_\_ Insurance Agent Phone: \_\_\_\_\_ Value: \_\_\_\_\_



**Personal Items**

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Item Type: \_\_\_\_\_ Item Name: \_\_\_\_\_ Current Location: \_\_\_\_\_

Estimated Current Market Value: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

**Stocks, Bonds, Securities, etc.**

Asset Type: \_\_\_\_\_ Company: \_\_\_\_\_

Account Value: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Company: \_\_\_\_\_

Account Value: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Company: \_\_\_\_\_

Account Value: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Company: \_\_\_\_\_

Account Value: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Company: \_\_\_\_\_

Account Value: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

**Significant Businesses**

Entity Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_ Ownership Type: \_\_\_\_\_

Shares or Ownership %: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Transfer Restrictions: Yes | No

Entity Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_ Ownership Type: \_\_\_\_\_

Shares or Ownership %: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Transfer Restrictions: Yes | No

Entity Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_ Ownership Type: \_\_\_\_\_

Shares or Ownership %: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Transfer Restrictions: Yes | No

Entity Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_ Ownership Type: \_\_\_\_\_

Shares or Ownership %: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Transfer Restrictions: Yes | No

Entity Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_ Ownership Type: \_\_\_\_\_

Shares or Ownership %: \_\_\_\_\_ Estimated Value: \_\_\_\_\_ Transfer Restrictions: Yes | No



**Debts**

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Owed to Me

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Description: \_\_\_\_\_ Loan Date: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Current Balance: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Other Assets

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Description: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Description: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Description: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Description: \_\_\_\_\_

Asset Type: \_\_\_\_\_ Estimated Value: \_\_\_\_\_

Description: \_\_\_\_\_



# Online Accounts

## Login Credentials

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

## Subscriptions

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_



Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

## Online Accounts

### Login Credentials

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Details: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_ Username: \_\_\_\_\_  
Password Manager: \_\_\_\_\_ Price: \_\_\_\_\_ Billing Rate: \_\_\_\_\_  
Description/Benefits: \_\_\_\_\_



# Special Instructions

In this section, you can identify the locations of your important documents and necessary records for your family. This can help them avoid some of the stress that comes with your passing, as they're relieved of the headaches that can come with looking for information they need to expedite the process of transitioning your assets.

## Where to Find Important Documents

Last Will and Testament: \_\_\_\_\_

Last Will and Testament Copy: \_\_\_\_\_

Living Will/Health Care Directives: \_\_\_\_\_

Trust Documents: \_\_\_\_\_

Birth Certificate: \_\_\_\_\_

Marriage Certificate: \_\_\_\_\_

Divorce Documents: \_\_\_\_\_

Retirement Account Documents: \_\_\_\_\_

Insurance Contracts: \_\_\_\_\_

Tax Documents: \_\_\_\_\_

Business Documents/Contracts: \_\_\_\_\_

House/Land Deeds: \_\_\_\_\_

Automobile Titles: \_\_\_\_\_

Health Records: \_\_\_\_\_

Bank/Credit Card Documents: \_\_\_\_\_

Mortgage Documents: \_\_\_\_\_

Safety Deposit Box: \_\_\_\_\_ Safety Deposit Box Key: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

## My Safe(s)

I own a safe: Yes | No Location of My Safe: \_\_\_\_\_

Safe Combination: \_\_\_\_\_ Location of Safe Combination: \_\_\_\_\_



## Checklist for My Family

With this estate plan, I have worked to eliminate as much stress as possible and save my loved ones from the responsibility and financial burden that oftentimes comes with losing someone. There are, however, a few actions I cannot take myself. I kindly ask that you complete the following checklist to provide a seamless transition for everyone important to me. I hope that it also helps you move my assets as swiftly as possible so that you can focus on what's important and save yourself the time and costs that come with dragging the process out. Additionally, please remember that this is not a comprehensive guide. The estate plan will outline further directives, and this is meant to be a starting point in the immediate aftermath, short-term future and medium-term future. My attorney should be able to help you with further information.

### Following my passing, please:

- Notify my family members, friends, employers and any others I have committed my time to.
- Make arrangements for my remains as well as my burial. If I have requested to be buried at a specific cemetery, please reach out to them.
- Write an obituary in my honor for distribution to my loved ones, local news outlet, funeral homes, etc.
- Arrange for the funding of my funeral service, burial and other expenses.
- Contact my attorney for further directives and more information about the steps that must be taken.
- If I was a business owner, follow the short-term succession plan I have outlined.
- Gather the important documentation I have given locations to on previous pages.
- Cancel my mail, credit cards, subscriptions and memberships.
- Contact my insurance companies to alert them that I have passed.
- Make a list of my assets. My last will and testament should help as you inventory and transition them.
- Obtain my death certificate as well as credit reports. This helps prevent fraudulent accounts from being opened.
- Consider deleting my email, social media and other online accounts if possible. If the accounts accrue periodic charges, terminate them to avoid continued withdrawals.
- Report my death to the Social Security Agency and discuss potential survivor's benefits.
- If I was a veteran or a federal employee, please contact the US Veterans Affairs Department or the Office of Personnel Management.
- Follow up with my lawyer to ensure that all necessary actions have been taken.



## Further Information

In this section, please leave any further directions that have not been addressed by the preceding workbook.