



**A Quick Starter Guide for**  
**Estate Planning Made**  
**Simple!**

## Worksheet 1: The Checklist

Here's a quick summary of some basic estate planning documents. You may not need all of these documents. Cross out the ones you think you don't need. If circumstances end up changing, then you can add them back later.

- Will**—instructions for distributing your financial assets and personal property.
  - Trust**—Appoints a trustee to manage financial assets for your beneficiaries so that those funds will not be misused.
  - Emergency and Permanent Guardians for Minors Nomination**—Authorizes temporary guardians for your children in case of injury or illness and prevents them from staying in a foster home.
  - Advance Health Care Directive**—In California, this is a single document that includes a Living Will and Health Care Power of Attorney.
  - Health Care Power of Attorney**—Empowers someone you trust to make health decisions for you if you can't make them yourself.
  - Living Will**—Expresses your wishes about being put on life support.
  - Third Party HIPAA Release**—Gives permission for health care personnel to disclose details about your medical condition to a third party.
  - Organ Donation Authorization**—Certifies your decision to be an organ donor, and you can authorize the donation of your organs for scientific research.
  - General Durable Power of Attorney**—Appoints someone you trust to handle your financial affairs if you become incapacitated or die unexpectedly.
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## **Worksheet 2:** **Persons to Act For You**

This worksheet helps you start a list of trusted people that can help you with your estate plan. The same person can be chosen for more than one role, but each role has different responsibilities.

Be sure to name backups in case your primary choice is unable or unwilling to serve at the time. You don't know when someone will move away, suffer an illness or injury, or go through a divorce that changes his or her ability to help you.

**Because each situation is different, consider talking with the people on your list (even your backups) and ask them if they are willing to serve. They may need fair warning if tragedy strikes.**

### **Guardians for Minor Children** **(Both emergency and permanent)**

Here you'll list two groups of people below—those you approve to be guardians for your children, and those you want to avoid. The second group is your list of “undesirables,” meaning they're so unfit to be guardians that foster care is the better alternative.

Here are some questions to consider before you make your choice:

1. Where does the potential guardian live? Children move to where the guardian is, not the other way around.



- 2. What are the religious, political, and moral beliefs of the potential guardian?
- 3. What do you know about the potential guardian's parenting skills?
- 4. How old is the potential guardian? Do they have the time and the strength to raise your children?
- 5. What is the potential guardian's family situation? Are they single, married with no children, married with young children, married with older children, or do they have a blended family?
- 6. What is the potential guardian's financial situation? Are they good with managing money? Do they have a stable job?
- 7. Who could be a backup in case something happens to the guardians you name?

Name and Address for APPROVED guardians:

Relationship

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Name and Address for UNAPPROVED Guardians:

Relationship

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### **Trust Guardian Nomination:**

If you choose to put some of your assets in a trust, who would be the best person to manage those assets and wisely distribute them to your beneficiaries?

Here are some questions to consider:

1. Does this person have the knowledge and experience to make wise investments?—it's not enough to be trustworthy. Whoever you pick needs to have the financial expertise necessary to handle the assets in the trust properly.
2. Is this person financially responsible?





## Health Care Agents

This applies to the Health Care Power of Attorney. These people will make medical decisions for you rather than financial decisions. Just like Trustee or Power of Attorney, you can appoint more than one person and married couples usually list their spouse as their first choice. **Because each situation is different, consider talking with the people on your list (even your backups) and ask them if they are willing to serve. They may need fair warning if tragedy strikes.**

Here are some questions to consider before you make your choice:

1. Are they assertive enough to make strong decisions on your behalf?
2. Do they live close to you?
3. Do they understand your health conditions?
4. Will they have power both over finances AND medical decisions?
5. And most importantly of all, do you have complete trust in this person?
6. Who could be a backup in case something happens to your first choice or they are unwilling to serve?

Name and Address:

Relationship

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## Pet caretakers

Here are some questions to consider as you make your choice for a pet caretaker and/or a trustee:

1. Do they like animals?
2. Would they have enough room to house your pets?
3. Do they have the financial means to care for your pets?
4. Who could be a backup in case something happens to the first guardians you name?

List four possible candidates for pet caretakers below:

Name and Address: Relationship

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**Worksheet 3**  
**Who Am I?**

Documenting an entire life seems intimidating at first, but these worksheets will help you narrow your focus and record the things that are of the most value. Let's get started by using a legacy tool I learned from Scott Farnsworth, President of Sunbridge, Inc. and Founder of the Legacy Builder Network. For this activity, you complete the following three sentences:

1. My name is \_\_\_\_\_, I live in \_\_\_\_\_,  
and I (add a personal detail about yourself)

\_\_\_\_\_.

2. I come from a people who were:

\_\_\_\_\_, \_\_\_\_\_, And \_\_\_\_\_.

3. From these people I learned:

\_\_\_\_\_, \_\_\_\_\_, And \_\_\_\_\_.

This exercise can be as short as three sentences or as long as three pages.

Here's what I wrote after trying this exercise myself:

*My name is Victor Vega and I live in New Brunswick, NJ. Almost anyone I meet, I consider a friend.*

*I come from a people who were hard working, the salt of the earth, extremely patriotic, dedicated, and committed to our country. My father was from the big city, growing up in New York. He was a second-generation Puerto Rican. My mother was from a very small town in Puerto Rico. Her father came to New York with millions of Puerto Ricans during the bootstrap revolution in the 1960s.*



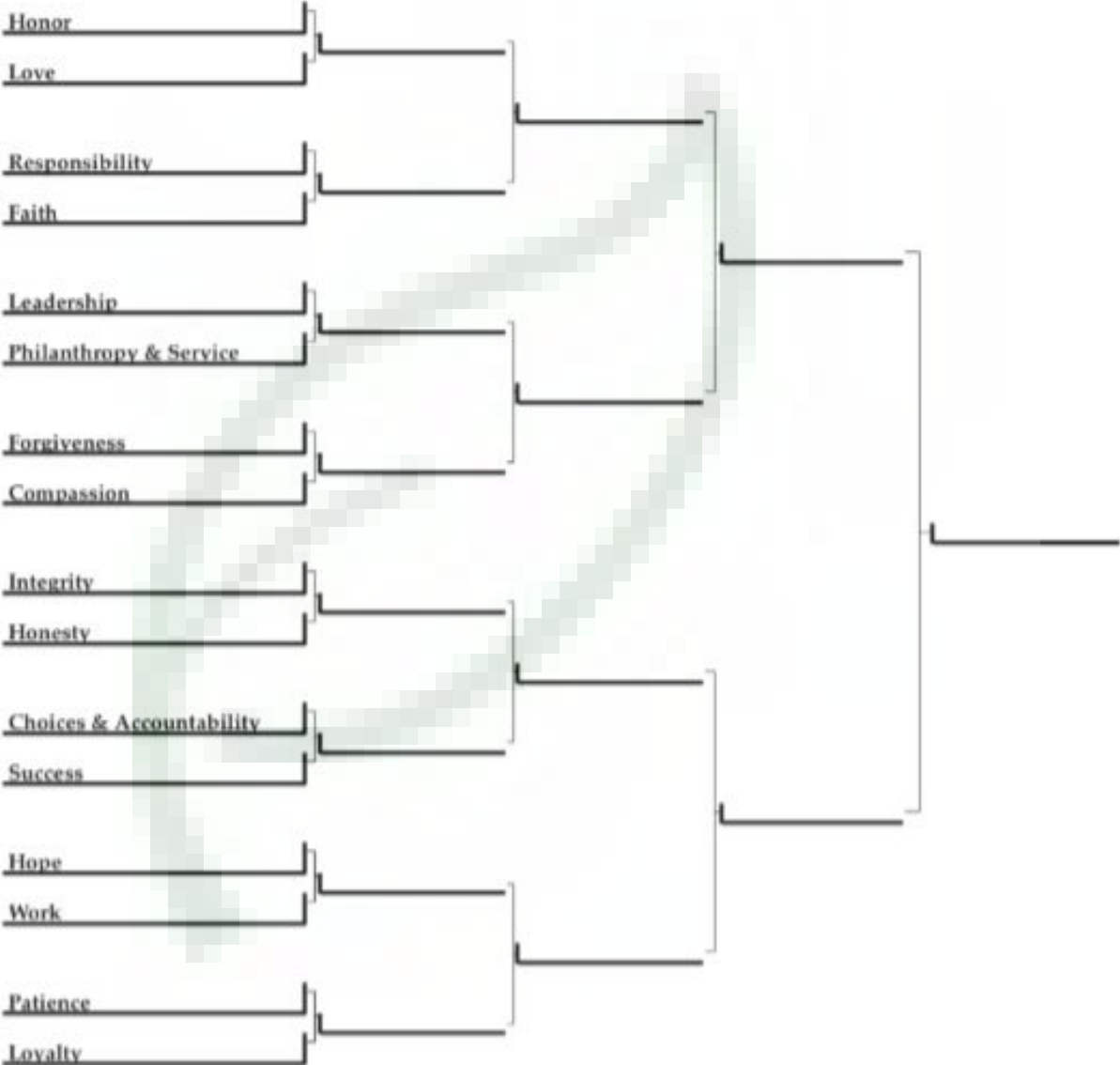
*My parents came from very different backgrounds, which gave me full exposure to different life lessons and experiences, but with a common belief system and a united focus. This influenced all the important lessons I learned from my parents.*

*From them, I learned the importance of family, the support that comes from family and friends, and to work hard. If you wanted something you had to work for it; if you worked for it, you would receive rewards and satisfaction. I was taught that achievements in life are obtained by participating, working, and serving others. My parents taught me deep and abiding faith, along with confidence in myself and my ability to complete the job that I had undertaken.*

This exercise gives you a quick summary of yourself and can help you decide what else should be included in your legacy.

**Worksheet 4:**  
**What Really Matters**

On the next two pages, use the charts to help you figure out which values are important to you. I believe that as you identify treasured values and share why those values are important to you, it will become a positive influence on your life and the lives of your children. Including your most important values in your estate plan creates a family a document that becomes a glue to hold your family together for the future.



**Worksheet 4 Continued**

After you've identified your top three values, the next step is to record the following:

1. What do my values mean to me?

Value 1: \_\_\_\_\_

Definition: \_\_\_\_\_

Value 2: \_\_\_\_\_

Definition: \_\_\_\_\_

Value 3: \_\_\_\_\_

Definition: \_\_\_\_\_

2. Write down the stories of how and when these values became important to you:

Value 1

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Value 2

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**Worksheet 5:**  
**Funeral Arrangements**

What is my religious membership or spiritual beliefs?

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I desire that services be:  for friends and relatives or  private

Desired location for the funeral:

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Describe the type of funeral you would like to have:

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Spiritual leaders in my life who share my beliefs:

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Pallbearers:

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Scripture Selections:

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Music selections:

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Other Readings:

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Viewing Wishes:  open casket  closed casket

Other Notes For Consideration:

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**Worksheet #6**  
**Why Estate Plans Fail**

Go over this checklist to make sure that all potential problems with your estate plan have been considered.

1. Have I given a copy of my estate documents to at least two different households that will be promptly notified upon my death (family, friend, neighbor)?
  2. Have I put my estate planning documents in a safe place that is accessible to my family or trusted friends?
  3. Have I updated my estate planning documents in the last five years?
  4. Are my wishes stated in clear, undisputable language in my will?
  5. Have I included clear instructions for my funeral arrangements?
  6. Did I give instructions on how to distribute my personal items?
  7. If I have a blended family, have I made provisions with my attorney to make sure that all the right people get their inheritance?
  8. Have I put my assets in a trust to protect them from my children's creditors or other events like lawsuits and divorce?
  9. Are all of my assets owned under the proper name?
  10. Have I named a caretaker for my pets and left instructions for their care?
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**Worksheet #7**  
**Updating Your Estate Plan Checklist**

Whenever you update your estate plan (at least annually), go through this checklist to make sure you've covered everything.

- Does my family know where my estate documents are?
- Are my trusted helpers still able and willing to serve?
- Do I need to take anyone off my estate plan?
- Do I need to add anyone to my estate plan?
- Am I living in a different state where estate-planning laws might be different?
- Do I still own all my assets properly?
- Do I need to change the title on assets I've recently acquired?
- Have I changed my mind about personal wishes for sentimental gifts, caretakers, or funeral arrangements?