

*Estate
Planning
101
Worksheet*

Planning your estate is a significant responsibility. Consider the following questions while making the decisions surrounding the planning of your estate.

Answer the following questions to gain a better perspective of your understanding of your estate planning situation.

1. What is my net worth? What level of estate planning am I likely to require?

2. Do I know a good estate-planning attorney? Do I know someone that has used an estate-planning attorney and can recommend one? Who?

3. Are there any charities to which I would like to give part of my estate?

4. What would happen to my children and my spouse or partner if I were to die today?

5. Do I need life insurance to provide for their needs? What expenses do I need to cover? How much life insurance should I get to cover these expenses?

6. What can I do now to get started putting an estate plan into place?

7. Have I had any discussions with my partner or children about these issues?

8. What are my wishes regarding any medical decisions that may come up in the future?
