

# YOUR ESTATE PLANNING LIST

*Please enter the information that best fits your estate planning needs*

## WHO DO YOU WANT TO LEAVE GIFTS TO IN YOUR WILL?

### **BENEFICIARIES (Family, Friends, Charities)**

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:



# WHO WILL HANDLE YOUR AFFAIRS?

## **EXECUTOR (of your Will)**

Name:

Address:

## ALTERNATE (back up)

Name:

Address:

## **TRUSTEES (for Testamentary Trusts, Special Needs and other Living Trusts)**

Name:

Address:

## ALTERNATE (back up)

Name:

Address:

## **ATTORNEY IN FACT = POWER OF ATTORNEY**

Name:

Address:

## ALTERNATE (back up)

Name:

Address:

**GUARDIAN FOR MINORS (through Surrogate or Family court)**

Name:

Address:

ALTERNATE (back up)

Name:

Address:

*Be sure to obtain current/accurate names, addresses, phone numbers and email addresses*

**LIST ANY PROFESSIONALS WHO SHOULD BE CONTACTED TO ASSIST WITH HANDLING YOUR AFFAIRS? (only those that apply to your situation)**

**ACCOUNTANT**

Name:

Address:

**BANK (banker)**

Name:

Address:

**LIFE INSURANCE AGENT/COMPANY**

Name:

Address:

**REAL ESTATE AGENT**

Name:

Address:

**NURSING HOME/AGENCY**

Name:

Address:

**CHURCH**

Name:

Address:

**FUNERAL HOME**

Name:

Address:

**CEMETERY**

Name:

Address:

**- - - - END OF ESTATE PLANNING LIST - - - -**