

ESTATE PLANNING QUICKSTART
PLANNING FOR YOUR FUTURE

FOR YOUR DURABLE POWER OF ATTORNEY

(Person or Persons making legal and financial decisions for you when you cannot make those decisions)

Who would you like to be your decision maker for legal and financial decision making when you cannot make those decision.

1. Relationship to you and name _____

2. Relationship to you and name _____

Do you want your agents listed above to act together or individually, _____

FOR YOUR HEALTH CARE SURROGATE

(Person or Persons making your general and diagnostic health decisions when you cannot speak for yourself)

1. Relationship to you and name and address of the person

2. Relationship to you and name _____

FOR YOUR LIVING WILL

(Person or Persons making your end of life health decisions when you cannot speak for yourself)

1. Relationship to you and name and address of the person

2. Relationship to you and name _____

FOR YOUR LAST WILL AND TESTAMENT

1. What are your wishes on the disposition of your body after you die? Cremation, special type of service, or other special instructions_____

2. What are your plans for the distribution of your tangible personal property (such as your automobiles and furniture and other tangible personal property) _____

3. What are your plans for distribution of the remaining assets of your estate? _____

4. Who would you like to serve as the Personal Representative of your Estate?

1. Relationship to you and name and address of the person

2. Relationship to you and name_____
