



SD Probate Concierge Estate Planning Worksheet

SDprobateconcierge.com

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Get Started on the Path to Protecting Your Loved Ones

Section 1: Personal Information

- Full Name: _____
- Date of Birth: _____
- Spouse's Name (if applicable): _____
- Date of Birth: _____
- Children's Names & Ages: _____
- Primary Contact Information: _____
 - Address: _____
 - Phone Number: _____
 - Email: _____

Section 2: Executor & Trustee Information

The executor or trustee will be responsible for carrying out your wishes after you're gone. Choose a trustworthy and reliable individual for these important roles.

- **Executor (Name & Contact Info):** _____
 - **Backup Executor (Name & Contact Info):** _____
 - **Trustee (Name & Contact Info, if applicable):** _____
 - **Backup Trustee (Name & Contact Info, if applicable):** _____
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Section 3: Will & Trust Information

Will: A will outlines your wishes for how your estate will be distributed after your death.

- **Do you currently have a will?** (Yes/No)
- **Do you want to create or update your will?** (Yes/No)
- **Location of current will:**

Trust: A trust is a legal document that allows you to transfer assets to a trustee for the benefit of your beneficiaries.

- **Do you currently have a trust?** (Yes/No)
- **Do you want to create or update your trust?** (Yes/No)
- **Location of current trust:**

Section 4: Beneficiary Information

Primary Beneficiaries: These are the individuals or entities that will receive your estate after your passing.

- **Name:**

- Relationship: _____

- Percentage of Estate: _____

(Repeat for additional primary beneficiaries.)

Secondary Beneficiaries: These are your backup beneficiaries in case any primary beneficiaries are unable to receive the estate.

- **Name:**

- Relationship: _____

- Percentage of Estate: _____

(Repeat for additional secondary beneficiaries.)

Section 5: Asset Overview

Make a list of your major assets and their locations to ensure everything is accounted for in your estate plan.

- **Real Estate Properties:**

- Address: _____

- Estimated Value: _____
- Ownership Type (e.g., sole, joint with spouse): _____

(Repeat for additional properties.)

- **Bank Accounts:**

- Bank Name: _____
- Account Type
(checking/savings): _____
- Approximate Balance: _____

(Repeat for additional accounts.)

- **Investments:**

- Investment Type (e.g., stocks, bonds, retirement accounts): _____
- Account Numbers (if applicable): _____
- Approximate Value: _____

(Repeat for additional investments.)

- **Personal Property (e.g., cars, jewelry, art):**

- Description: _____
- Estimated Value: _____

(Repeat for additional items.)

Section 6: Special Instructions

- **Funeral and Burial Wishes:**
 - Preferred Funeral Home:
 - Cremation or Burial Preference:
 - Any specific funeral arrangements you'd like to include:
 - **Charitable Donations:**
 - Charities/Organizations to Receive Donations:
 - Amount/Percentage of Estate:
 - **Other Special Requests (e.g., care for pets, guardianship for children):**
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Section 7: Healthcare & Financial Power of Attorney

These documents grant someone you trust the authority to make decisions on your behalf in the event that you become incapacitated.

- **Healthcare Power of Attorney (POA):**
 - Name of Designee: _____
 - Contact Information: _____

- Specific Wishes for Healthcare (e.g., life support, organ donation):

- **Financial Power of Attorney (POA):**

- Name of Designee: _____
- Contact Information: _____
- Specific Financial Decisions You Want Covered (e.g., managing accounts, paying bills): _____

Section 8: Final Steps & Next Steps

Now that you've completed your Estate Planning Worksheet, here are the next steps to ensure your wishes are legally binding:

1. **Schedule a meeting with an estate planning attorney** to discuss your options and get your will and trust drafted.
2. **Review beneficiaries** to ensure they are up-to-date with your current life circumstances.
3. **Secure copies of your estate documents** in a safe place (such as a safety deposit box) and ensure your executor and family members know where they are located.
4. **Keep your estate plan up-to-date.** Review your plan regularly to account for any life changes, such as marriage, divorce, or the birth of children.

Next Steps for Implementation:

- Reach out to your estate planning attorney.
- Make sure your documents are signed, notarized, and stored securely.

- Inform your loved ones of your plans and ensure they know how to access your documents when needed.