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# WORKBOOK

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## *Your Estate Plan*

Easy first steps to arranging your affairs

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# Q: Do you need an estate plan?

An estate plan is a set of legal documents that gives people instruction about how to handle your medical decisions and property when you are unable to do so yourself. An estate plan can include any mix of the following documents: last will & testament; revocable or irrevocable trust; health care power of attorney; living will/advance directive; or guardianship papers.

But do you need any of these documents? Take this simple quiz to find out!

Score 1 point for each time you answer "yes" to the following questions:

1. Are you over 18 years old?
2. Do you own a house?
3. Do you have savings of ANY amount (\$7 to \$7 million!)?
4. Do you have minor children or other dependents?
5. Have you experienced a major life event, such as a birth, death, marriage, or divorce, since you created your prior estate plan?

Results: 0 points - Recalculating... review your answers.

1-5 points - You need an estate plan. Keep reading to learn more!





## Step One

Use the chart on page 5 as you work through the rest of the workbook. First, inventory your stuff & make a list divided by whether your stuff will go through probate or not.



## Non-probate property

Non-probate stuff includes the following types of things:

- Property owned jointly with the right of survivorship
- Things with beneficiary forms like life insurance policies & investment accounts
- Things with pay on death designations like bank accounts



## Probate property

Probate property includes everything else. Think of things like:

- Vehicles
- Collectibles such as art, antiques, and Grandma's jewelry
- Property owned in a way other than joint owners with the right of survivorship





## Step Two

Decide who you want to get your stuff when you pass away. Write the names in that column on page 5.



## Non-probate property

For your non-probate stuff, are those the people on your beneficiary forms? If not, consider updating your forms.



## Probate property

For your probate stuff, do you know if those people will actually receive the things you want them to have?





## *Step Three*

Decide who the important players are in case you become unable to make decisions for yourself or pass away.



## *If incapacity sets in...*

Who will be your power of attorney or make medical decisions for you? What about your kids or other dependents? Who do you want to take care of them if your are not able to do so?



## *After you pass...*

Who will be the executor or personal representative of your estate? This is the person responsible for taking the steps necessary to carry out your estate plan. Choose someone you trust who will be able to handle the responsibility.



# Your Planning Page

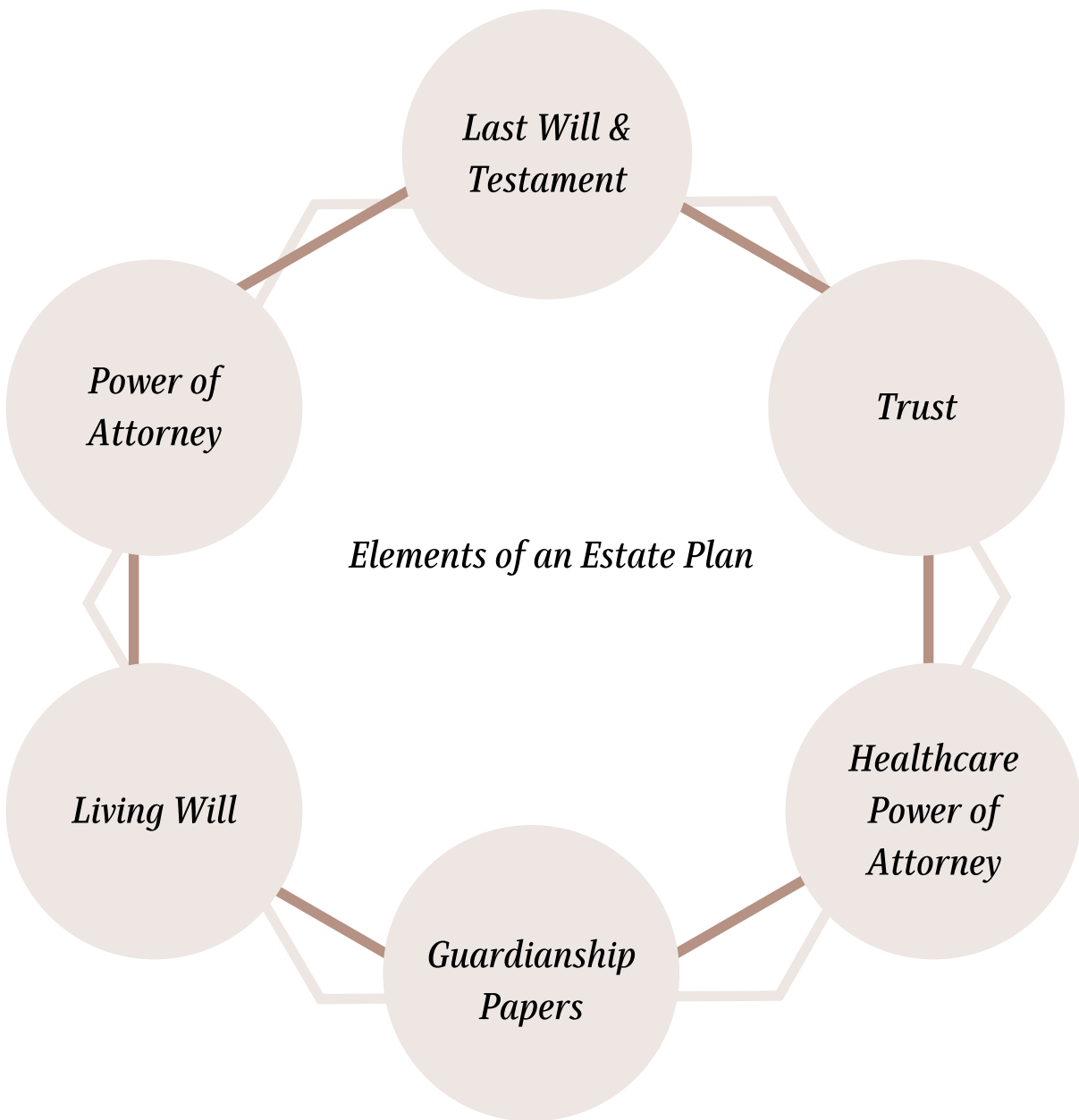
Please use this page to make notes as you work through the the workbook.

<b>Non-Probate Property</b>	<b>Names</b>
<b>Probate Property</b>	
<b>Power of Attorney Medical Decisions Dependents' Caregivers</b>	



# Your Next Steps

You have an estate plan whether you know it or not. But is the plan you currently have the one you want? If you have not created your own plan, you have the default plan created by the state. Without writing your own plan, the state - not you - will decide who receives your stuff when you die. By creating the list above, you're halfway there. Now it's time to take the steps to make your plan legally enforceable! Schedule an appointment with me when you're ready.





# Hi! I'm Kathy Bushnell, Esq.

My passion is empowering women entrepreneurs to find peace of mind in their businesses and in their personal lives. To achieve this goal, I offer services for business, trademarks, estate planning, adult guardianship, and probate.

I'm a single mother of four sons and a business owner. I know just how hard it is to find time to take care of life's necessities. I aim to make the process as easy and stress-free as possible.

I look forward to serving you. You may schedule an appointment at a time convenient for you on my website: [www.kathybushnellesq.com](http://www.kathybushnellesq.com) . Just follow the link to "Schedule a Meeting."

Kindly,  
Kathy

## LET'S KEEP IN TOUCH

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