KINGSVIEW
PARTNERS

ESTATE PLANNING 101

STEP 1 OF 7

Getting Started

A snapshot of where things stand today.

Your Information

FULL LEGAL NAME

TODAY'S DATE

SPOUSE'S FULL LEGAL NAME

STATE OF PRIMARY RESIDENCE

OTHER STATES WHERE YOU OWN REAL PROPERTY

Children

List up to 8 children (include adult children too).

CHILD'S FULL NAME	DATE OF BIRTH

What Are You Looking For?

Check all that apply – this just helps us point you to the right next steps

INTERESTED IN

- ☐ Will → *Go to Living Will Section*
- ☐ Trust → *Go to Revocable Living Trust*
- ☐ Power of Attorney only → *Go to Financial Power of Attorney and Health Care Directives*
- ☐ Unsure → *Schedule a Call*

Where You Stand Today

DO YOU CURRENTLY HAVE A WILL?

☐ Yes ☐ No ☐ Not Sure

DO YOU CURRENTLY HAVE A LIVING TRUST?

☐ Yes ☐ No ☐ Not Sure

If you own property in more than one state, note it above – it can mean more than one probate proceeding without a plan.

Accounts with Beneficiary Designations

These pass directly to the named beneficiary, regardless of your will or trust. List what you know so far.

ACCOUNT / ASSET	CURRENT BENEFICIARY	UP TO DATE?

Life Insurance

These pass directly to the named beneficiary, regardless of your will or trust.

POLICY / COMPANY	CURRENT BENEFICIARY	UP TO DATE?

Questions

NOTES

THE TAKEAWAY

If you don't create a plan, your state already has one for you. This worksheet is step one toward writing your own.

This worksheet is for educational and organizational purposes only and is not legal advice. Bring your completed worksheet to a qualified estate planning attorney

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STEP 2 OF 7

Will Worksheet

Your instructions to the probate court.

Executor

EXECUTOR NAME _____

RELATIONSHIP _____

PHONE _____

EMAIL _____

ALTERNATE EXECUTOR NAME _____

RELATIONSHIP _____

Guardian for Minor Children

Leave blank if not applicable

GUARDIAN NAME _____

RELATIONSHIP _____

ALTERNATE GUARDIAN NAME _____

RELATIONSHIP _____

Temporary Guardian

Someone who can step in immediately in an emergency, before the court formally appoints the permanent guardian named above. List in order of preference.

TEMPORARY GUARDIAN NAME	RELATIONSHIP

Beneficiaries

Who receives your assets, and in what share.

BENEFICIARY NAME	RELATIONSHIP	SHARE / %

Specific Bequests

Particular items you want to go to a particular person

ITEM	RECIPIENT

Notes for Your Attorney

THE TAKEAWAY

A will doesn't avoid probate — it guides it. These are the instructions you're giving the court.

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STEP 3 OF 7

Revocable Living Trust Worksheet

You stay in control — today and tomorrow.

Trust Basics

If you're married, list both spouses as Initial Trustees — most married couples serve as co-trustees together. Carried over automatically from the Getting Started worksheet.

TRUST NAME (E.G. "THE SMITH FAMILY TRUST")

INITIAL TRUSTEE 1 – USUALLY YOU

INITIAL TRUSTEE 2 – SPOUSE, IF MARRIED

SUCCESSOR TRUSTEE

RELATIONSHIP

ALTERNATE SUCCESSOR TRUSTEE

RELATIONSHIP

Trust Beneficiaries

Per Stirpes: a deceased beneficiary's share passes down to their descendants. Lapse: their share is redistributed among the surviving beneficiaries. See the Per Stirpes vs. Lapse guide for a fuller explanation.

BENEFICIARY NAME	RELATIONSHIP	SHARE / %	PER STIRPES	LAPSE
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐

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Funding Checklist

A trust only controls what's actually inside it. Check what still needs to be retitled.

PRIMARY RESIDENCE

☐ Funded ☐ Not yet ☐ N/A

OTHER REAL ESTATE

☐ Funded ☐ Not yet ☐ N/A

BANK ACCOUNTS

☐ Funded ☐ Not yet ☐ N/A

INVESTMENT ACCOUNTS

☐ Funded ☐ Not yet ☐ N/A

BUSINESS INTERESTS

☐ Funded ☐ Not yet ☐ N/A

Notes for Your Attorney

THE TAKEAWAY

A trust isn't just something you sign — it's something you use. Fund it, and it works for your family.

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STEP 4 OF 7

Financial Power of Attorney Worksheet

Someone to manage your money if you can't.

Your Agent

AGENT NAME _____

RELATIONSHIP _____

PHONE _____

EMAIL _____

ADDRESS _____

ALTERNATE AGENT NAME _____

RELATIONSHIP _____

When Should Authority Begin?

CHOOSE ONE

☐ Immediate authority ☐ Springing authority (upon capacity)

Overlapping Roles

Check any role your agent above will also hold.

ALSO SERVING AS

☐ Successor Trustee ☐ Executor ☐ Neither – different people

Notes for Your Attorney

THE TAKEAWAY

Choose someone trustworthy, financially responsible, and ready to act on your behalf.

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STEP 5 OF 7

Health Care Agent Worksheet

Your voice when you can't speak for yourself.

Your Health Care Agent

AGENT NAME

RELATIONSHIP

PHONE

ADDRESS

LIVES NEARBY OR IN THE SAME STATE?

☐ Yes ☐ No

Alternate / Younger Backup

ALTERNATE AGENT NAME

RELATIONSHIP

Your Wishes

Share anything you want your agent to know — values, beliefs, or specific preferences about treatment or end-of-life care.

LIFE-SUPPORT / END-OF-LIFE PREFERENCES

OTHER VALUES OR PREFERENCES YOUR AGENT SHOULD KNOW

NOTES

THE TAKEAWAY

Choose someone who will stay calm under pressure and honor your wishes — not their own.

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STEP 6 OF 7

HIPAA Authorization Worksheet

The privacy lock on your medical information.

Who Can Access Your Medical Information?

These are the people who can talk with your doctors and review your records — this does not give them decision-making authority.

NAME	RELATIONSHIP	PHONE

Any Limits?

SHOULD ACCESS BE LIMITED TO SPECIFIC PROVIDERS OR SITUATIONS?

☐ Yes ☐ No

IF YES, DESCRIBE

Notes for Your Attorney

THE TAKEAWAY

HIPAA gets the information. Your Healthcare Power of Attorney makes the decisions. Both matter.

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STEP 7 OF 7

Property & Deed Worksheet

The bridge that moves your property into your trust.

Property Details

PROPERTY ADDRESS

COUNTY

STATE

Property Type

TYPE

☐ Primary residence ☐ Vacation home ☐ Rental ☐ Land ☐ Other

Current Ownership

How the deed reads today — check for a former or deceased spouse still listed.

OWNER(S) CURRENTLY ON DEED

DOES A NAME NEED TO BE CLEANED UP?

☐ Yes ☐ No

IF YES, DESCRIBE

Mortgage & Exemptions

MORTGAGE LENDER (FOR NOTICE PURPOSES)

HOMESTEAD EXEMPTION IN PLACE?

☐ Yes ☐ No ☐ Not sure

NOTES

THE TAKEAWAY

A trust is a great first step. If the property isn't deeded into it, it may still go through probate.