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## Estate Planning Worksheet for Single Individuals

The information requested on this worksheet may seem like none of our business, but it is very important that an estate planner understands your present situation and your wishes for the future. This information enables us to plan the estate to accomplish future goals and to save on taxes and administrative expenses.

This worksheet is intended for single clients. If you are married, or if a domestic partner will be included in your estate plan, please request the appropriate estate planning worksheet from us.

Estate planning is very important for singles as well as couples. Plan of distribution for singles is not obvious and most or all assets will be probated since joint tenancy with a spouse or partner is not an appropriate method of avoiding probate.

|                |  |                |           |
|----------------|--|----------------|-----------|
| Date           |  |                |           |
| First Name     |  | Last Name      |           |
| AKA            |  |                |           |
| Address        |  | City           | State Zip |
| Home Phone ( ) |  | Cell Phone ( ) |           |
| Email          |  |                |           |

### What is your primary motivation for considering estate planning? (Select one or more)

Probate avoidance

Guardianship for minor children

Business or farm planning

Federal estate tax planning

Other: \_\_\_\_\_

How soon would you like to complete planning? Is there a specific deadline, such as an upcoming trip, surgery, etc.? \_\_\_\_\_



## Appointments

1. **Successor Trustee** The successor trustee would be responsible for managing assets if you were unable to do so. The successor trustee would manage assets in the event of your incapacity and would distribute assets to beneficiaries after death.

Successor Trustee: \_\_\_\_\_ Alternate: \_\_\_\_\_

2. **Durable Power of Attorney Agent** A Durable Power of Attorney will be prepared as part of your Estate Plan. This power enables your agent to conduct all your financial affairs if you become incapacitated temporarily. This power is no longer available upon your death or permanent incapacity, at that time, the successor trustee takes over.

Agent: \_\_\_\_\_ Alternate: \_\_\_\_\_

3. **Health Care Agent** Who should be named to make medical decisions on your behalf including decisions regarding medical consents, life support issues, and nursing home admission if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent (include address and phone).

Health Care Agent: \_\_\_\_\_ Alternate: \_\_\_\_\_

## Plan of Distribution

1. **Specific Gifts** Do you want to make charitable gifts, such as to a house of worship or other institution? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?

\_\_\_\_\_

2. Briefly describe where you would want assets remaining after any specific gifts are distributed. (Don't worry about tax planning or other considerations in answering this question. We'll consider those details later if needed.)

Equally between children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.

Equally between surviving children

As follows:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. **Ultimate Distribution.** You might want to provide for the distribution of your property if neither you, nor your children/other beneficiaries named above survive.

\_\_\_\_\_



## Asset/Liability Information

Please list your asset/liability information in the appropriate category below. Attach a separate page if necessary.

| Type of Asset   | Title in Which Held<br>(You solely, Joint with third party, Tenants in common, etc.) | Current Value      |                      |               |
|---|--|--------------------|----------------------|---------------|
| <b>Real Estate</b><br>(Include type of property e.g., residential, agricultural, commercial, or manufacturing.) |  |                    |                      |               |
| Personal Residence  |  |                    |                      |               |
| Vacant Land   |  |                    |                      |               |
| Other   |  |                    |                      |               |
| <b>Liquid Assets</b><br>Include account number and address where held.  |  |                    |                      |               |
| Cash on Hand  |  |                    |                      |               |
| Government and Publicly Traded Securities   |  |                    |                      |               |
| Unlisted Securities (Not Publicly Traded)   |  |                    |                      |               |
| Money Market Accounts   |  |                    |                      |               |
| Equity in Business Sole Prop.   |  |                    |                      |               |
| Partnership   |  |                    |                      |               |
| Notes and Loans Receivable  |  |                    |                      |               |
| Checking Accounts   |  |                    |                      |               |
| Savings Account   |  |                    |                      |               |
| Certificates of Deposit   |  |                    |                      |               |
| Automobiles   |  |                    |                      |               |
| Other Personal Property   |  |                    |                      |               |
| <b>Annuities</b>  | <b>Owner</b>   | <b>Beneficiary</b> | <b>Current Value</b> |               |
| IRAs  |  |                    |                      |               |
| Pension/Profit Sharing  |  |                    |                      |               |
| Life Insurance  |  |                    | Cash Value           | Death Benefit |
| Other Assets  |  |                    |                      |               |
| <b>Liabilities</b>  | <b>Name Loan Taken In</b>  | <b>Amount Owed</b> |                      |               |
|   |  |                    |                      |               |
|   |  |                    |                      |               |
|   |  |                    |                      |               |