Southern Maine AGENCY On AGING Creating Better Days

Estate Planning:

Getting Started & Staying Organized

Often the hardest part of doing a will is getting started. Before speaking with any legal professional, collecting the information to begin the discussion is the first step. With this organizer, you'll be able to collect the pieces you need to start planning for your estate. It'll be a helpful tool for your loved ones or designated representative to turn to at a difficult time. Taking the step of planning is a gift to your family and to you ensuring that your wishes are fulfilled.

Once completed, be sure to keep this document in a safe place. It will be a compendium of your personal data so you'll want to safeguard it. Also, be sure to put your name on it, as well as the date you've completed it. It's a good idea to stay organized by reviewing this document yearly, perhaps during tax preparations, to make updates.

Personal Information

Name: ______________________________ Date Completed: __________

Financial Information: Assets

Bank accounts and Certificate of Deposit (CD's) savings vehicles

Bank Account	Account #	Est. Value	Account Ownership
			❑ You ❑ Joint ❑ Spouse ❑ Other
			❑ You ❑ Joint ❑ Spouse ❑ Other
			❑ You ❑ Joint ❑ Spouse ❑ Other
			❑ You ❑ Joint ❑ Spouse ❑ Other
			❑ You ❑ Joint ❑ Spouse ❑ Other

Total: __________________

Safety Deposit Box Locations

Institution/Location	Authorized Owner(s)

Mutual Funds

Institution	Authorized Owner(s)

Bonds

Institution	Authorized Owner(s)

Stocks

Institution	Authorized Owner(s)

Annuities: Annuitants/Beneficiary

IRA's Roth and Traditional (Specify)

Annuities	Account #	Beneficiaries

Retirement Plans including pension, 401(k), 403(b), profit sharing, defined benefit

Annuities	Account #	Beneficiaries

Life Insurance Policies (including Universal Life Policies)

Annuities	Account #	Beneficiaries

Charitable Annuities

Annuities	Account #	Beneficiaries

Real Estate

Property	Address	Value	Mortgage Balance	Owners
Primary Residence				
Vacation Property				
Commercial Investment				
Other Property				

Business Ownership

Name	Address	Value	Owners

Vehicles, Campers, & Boats

Year	Make/Model	Value	Owners

Advisor List

Please include name, address, and phone number.

Estate Attorney: ______________________________

Business Attorney: ______________________________

Accountant/Tax Professional: ______________________________

Financial Planner: ______________________________

Stock Broker: ______________________________

Primary Care Physician: ______________________________

Personal Representative/Executor: ______________________________

Other Representative: ______________________________

Personal/Family Items

Antiques & Artwork

- I have/have not (circle one) attached a listing of my antiques and artwork with estimated values with this document.
- I have/have not (circle one) included images of my antiques and artwork with this document.

Jewelry

- I have/have not (circle one) attached a listing of my jewelry with estimated values with this document.
- I have/have not (circle one) included images of my jewelry with this document.

Electronics

- I have/have not (circle one) attached a listing of my electronics with estimated values with this document.

Documents

My important financial papers are located (identify advisor, safe, safety deposit box, etc.):

____

❑ I have a health care directive.

I have selected ________________________________ to serve as my power of attorney to manage my financial affairs if I'm unable to do so due to physical or cognitive deficits.

Funeral Choices

My funeral home choice is (name, address, contact name/number):

____

I have shared the plans about my funeral wishes with: ______________________________________

Online Accounts

I have shared with __________________________ the location of my account names and passwords list.

Charitable Giving

Charity	Directed Donation