QUARTZ LAW
ESTATE PLANNING · ELDER LAW · PROBATE

FAMILY GUIDE · CHAPTER 17

Planning Worksheet

Preparing for your strategy meeting

This worksheet gathers the decisions from across the Family Guide into one place. Working through it before your strategy meeting lets our time together move past logistics to what matters most: the people you want to protect and how.

HOW TO USE THIS WORKSHEET

- Approximate is fine. You do not need exact figures or firm answers to begin.
- Skip anything that does not apply to you, and leave blanks where you are unsure.
- Planning as a couple? Complete one worksheet together and note anything that differs between you.
- Type into this PDF on screen, or print it and write by hand.

01 The People in My Life

Full legal names for your spouse, your children, and anyone you may name in a role or as a beneficiary.

FULL LEGAL NAME	RELATIONSHIP	BIRTH DATE (MINORS)	PHONE OR EMAIL

02 What I Own

A rough inventory. For each, note how it is titled (in my name, joint, or in a trust) and who is named as beneficiary, if anyone. This is where many plans quietly go wrong.

ASSET	APPROX. VALUE	HOW IT IS TITLED	BENEFICIARY NAMED
My home			
Other real estate			
Bank accounts			
Investment accounts			
Retirement accounts (401(k), IRA)			
Life insurance			
Business interests			
Vehicles			
Valuable personal property			
Other			

03 Who Receives What

In broad strokes. Note anyone with special circumstances or needs.

04 The People I Am Naming

Choose people who are honest, organized, and willing to serve, and name an alternate for each.

ROLE	FIRST CHOICE	ALTERNATE
Executor		
Trustee and successor (if I want a trust)		
Financial agent		
Healthcare agent		
Guardian for my minor child (if any)		
Person to manage money for my child (if any)		

05 My Wishes

My general wishes about medical care if I could not speak for myself

Anyone I want to specifically include or intentionally leave out

Any charitable gifts I want to make

06 Documents I Already Have

Bring anything you have, even if you think it is outdated.

- ☐ Will — Year signed / notes _____
- ☐ Trust — Year signed / notes _____
- ☐ Financial power of attorney — Year signed / notes _____
- ☐ Healthcare directive (advance directive) — Year signed / notes _____
- ☐ Beneficiary deed — Year signed / notes _____
- ☐ Other — Year signed / notes _____

07 The Questions I Most Want Answered

No question is too small. Even knowing which decisions feel hard is useful.

Bring this with you.

Bring this worksheet and any documents you checked above to your strategy meeting. For your privacy, please do not email account numbers or other sensitive details; share them with us in person.

This worksheet is a planning aid only. It is not legal advice, and completing it does not create an attorney-client relationship with Quartz Law PLLC.