



Estate Planning Worksheet

- 1) What does Estate Planning mean to you? How might a well-designed Estate Plan work in conjunction with an Emergency Preparedness Plan?

- 2) Estate Planning is a process through which you protect that which is most important to you. What is your most precious asset? Your child(ren), your grandchild(ren), your spouse? Maybe even your pet(s)? What do you want to protect the most and how?

- 3) Who is currently in your care that would need immediate attention in the event you are no longer able to care for him/her/them? Have you legally documented how your children and/or pets are to be cared for and by whom? You might have special needs relatives or aging family members you'll want to include in your care planning.

- 4) You must keep in mind that an estate plan isn't about YOU. It is instead about protecting your loved ones in the event of your death (or incapacitation). It is important to have your wishes well defined - and well communicated - instead of leaving those challenging decisions to your family members and/or to the court system. What steps have you taken and/or what tools do you have in place to ensure that your loved ones are cared for when you are gone?

- 5) Legacy planning documents are a necessary byproduct of a well-designed estate plan and are an integral part of emergency preparedness. Such documents include: Wills and/or Trusts, Financial Power of Attorney, Medical Power of Attorney, Advanced Directives/Living Will, and Guardianship designations (where applicable). A Family Emergency ID Card is also suggested for families with minor children (up to the age of 21 in some situations in CO) and/or pets. Schedule your free consultation today to discuss your unique estate planning needs: estateplanningincolorado@gmail.com or call 720-219-6606.