



# Estate Planning Documents Outline



## ACTION – Outline Your Estate Planning Documents

The *financial* PARTNER Estate Planning Outline allows you to recap your estate planning documents in one central location. By completing the outline, you will learn more about your current estate plan to help you determine if your plans and documents are up to date. As you become aware of estate planning changes note them on your Things To Do list for further research.



## Instructions – Estate Plan Document Outline

1. Locate your estate planning documents.
2. Complete an outline form for each one of your estate plan documents.  
You may also want to have your attorney or financial advisor assist you with completing these outlines.
3. Next, determine if there are ways to effectively improve your estate plan.
4. Log the estate document review on your Financial Planning Calendar and make a note to review your estate plan once a year.
5. Place your estate planning documents in your Financial Organizer.
6. Store these summaries in your Financial Organizer or forms binder.

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If you would like to learn more about the *financial* PARTNER System go to

<http://www.thefinancialawarenessfoundation.org>

If you would like to learn more about Your Estate & Gift Planning Organizer go to

<http://www.thefinancialawarenessfoundation.org>

Find more at [MindMoneyMotion.com](http://MindMoneyMotion.com)





# Estate Plan & Gift Plan Documents Outline

## WILLS

YOU

Full Name First \_\_\_\_\_ Last \_\_\_\_\_

Date- Will, Drafter's Name \_\_\_\_\_

Address, Phone & Email# \_\_\_\_\_

Executor, Phone & Email \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Guardian of the Person \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Guardian of the Property \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Trustee, Phone & Email \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Distribution Plan \_\_\_\_\_

Charitable Gifts \_\_\_\_\_



## TRUST

Date-Trust, Drafter's Name \_\_\_\_\_

Address, Phone & Email# \_\_\_\_\_

Trustee, Phone & Email #1 \_\_\_\_\_ #2 \_\_\_\_\_

Alternates \_\_\_\_\_

Distribution Plan \_\_\_\_\_

Charitable Gifts \_\_\_\_\_



## DURABLE POWER OF ATTORNEY- FINANCIAL MANAGEMENT

Date-DPAFM, Drafter's Name \_\_\_\_\_

Attorney in Fact \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Powers \_\_\_\_\_



## ADVANCE HEALTH CARE DIRECTIVE

Date-AHCD, Drafter's Name \_\_\_\_\_

Attorney in Fact \_\_\_\_\_

Alternates #1 \_\_\_\_\_ #2 \_\_\_\_\_

Powers \_\_\_\_\_



# Estate Plan & Gift Plan Documents Outline

## WILLS

### SPOUSE/PARTNER

<i>Full Name</i>	First _____	Last _____
<i>Date- Will, Drafter's Name</i>	_____	_____
<i>Address, Phone &amp; Email#</i>	_____	_____
<i>Executor, Phone &amp; Email</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Guardian of the Person</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Guardian of the Property</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Trustee, Phone &amp; Email</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Distribution Plan</i>	_____	_____
<i>Charitable Gifts</i>	_____	_____
	_____	_____
	_____	_____

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## TRUST

<i>Date-Trust, Drafter's Name</i>	_____	_____
<i>Address, Phone &amp; Email#</i>	_____	_____
<i>Trustee, Phone &amp; Email</i>	#1 _____	#2 _____
<i>Alternates</i>	_____	_____
<i>Distribution Plan</i>	_____	_____
<i>Charitable Gifts</i>	_____	_____
	_____	_____
	_____	_____

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## DURABLE POWER OF ATTORNEY- FINANCIAL MANAGEMENT

<i>Date-DPAFM, Drafter's Name</i>	_____	_____
<i>Attorney in Fact</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Powers</i>	_____	_____
	_____	_____

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## ADVANCE HEALTH CARE DIRECTIVE

<i>Date-AHCD, Drafter's Name</i>	_____	_____
<i>Attorney in Fact</i>	_____	_____
<i>Alternates</i>	#1 _____	#2 _____
<i>Powers</i>	_____	_____
	_____	_____