

ESTATE PLAN DOCUMENT ANALYSIS



Date: _____

Estate Documents for: _____

Estate Documents for: _____

EXECUTOR/ EXECUTRIX

EXECUTOR/ EXECUTRIX

Primary

Primary

2nd

2nd

3rd

3rd

4th

4th

LIVING WILL INSTRUCTIONS

LIVING WILL INSTRUCTIONS

If condition does not improve:

If condition does not improve:

Do use life support

Do Not use life support

Do use life support

Do Not use life support

MEDICAL POWER OF ATTORNEY

MEDICAL POWER OF ATTORNEY

Primary

Primary

2nd

2nd

3rd

3rd

4th

4th

FINANCIAL POWER OF ATTORNEY

FINANCIAL POWER OF ATTORNEY

Powers Granted

Powers Granted

Authority Begins

Authority Begins

Authority Ceases

Authority Ceases

Primary

Primary

2nd

2nd

3rd

3rd

4th

4th

The original estate planning documents were created by _____ in _____

Lawyer's office location _____

Phone number: _____ Location of documents on file: _____