

STEP 2 – I choo-choo-choose you!

My name is _____ and my address is _____

I am completing this worksheet for planning purposes only and choosing the individuals I would like to carry out my estate plans. The same person may serve in multiple capacities/roles. I will confirm that each person listed knows they are listed in these documents to prevent surprise.

Last Will and Testament – The Executor who can probate my Will and distribute per my instructions

Primary Executor: _____

Name

Address

Alternate Executor: _____

Name

Address

** For more alternates, please write them down on a separate sheet of paper*

Statutory Power of Attorney (SPOA) - To make financial decisions for me

Primary Agent: _____

Name

Address

Alternate Agent: _____

Name

Address

The SPOA starts: (check one) ___ The day I sign OR ___ When I become incapacitated or disabled

The SPOA can: (check all that apply) ___ make gifts ___ be compensated for their time

Medical Power of Attorney (MPOA) - To make medical decisions for me when I no longer can

Primary Agent: _____

Name

Address

Alternate Agent: _____

Name

Address

I will keep the original MPOA document and decide where to keep a copy of it