

STEP 3 – My Plan

My name is _____ and my address is _____, who is completing this worksheet for planning purposes only with the plan for my estate. This plan is meant to ease dealing with my estate.

1. For the **Real Property** (house, land, etc.) I own I want ALL to transfer by Will to my:

Primary Beneficiary: _____
Name Relationship

Alternate Beneficiary: _____
Name Relationship

2. I want my **Personal Property** to transfer to the beneficiaries below. I may decide to leave a note listing the beneficiaries of certain items in the future.

	Item	Description	Beneficiary
Ex.	<i>Lamp</i>	<i>Purple lava lamp</i>	<i>Maude</i>
1.			
2.			
3.			
4.			

3. For my **Financial Accounts** (checking, savings brokerage, etc.), I was informed to designate beneficiaries with the institutions holding my accounts. Doing this may help avoid probate. In case one or all my accounts did not have a beneficiary designated, I am listing:

Primary Beneficiary: _____
Name Relationship

Alternate Beneficiary: _____
Name Relationship

4. The **Residue of my Estate** is anything I own and not listed above.

Primary Beneficiary: _____
Name Relationship

Alternate Beneficiary: _____
Name Relationship