

Estate Plan Summary

for

Overview

Objectives:

Documents:

Dated: Last Amendment: Attorney:

Living Trust

Name:

Dated: Aligned with Objectives? Yes No

Trustee:

Successor Trustee:

Bypass Provision:

Other:

Pour-Over Will

Dated:

Personal Representative: Guardian:

Advanced Directive & HIPAA Release

Dated:

Healthcare Representative:

Durable Power of Attorney

Dated:

Attorney in Fact:

Logistics

Assets Titled to Trust?

Brokerage:

Bank Accounts:

Real Estate:

Business or Other Interests:

Retirement Account Beneficiaries

Primary:

Contingent:

Accounts: