**Estate Planning Worksheet (Single People) – Instructions**

1. Fill out the client’s full name and social security number.

2. Indicate the client’s date of birth and whether the client is a U.S. citizen.

3. List the client’s address.

4. Complete contact information should be provided for the client.

5. The client should list their employment position, and indicate if they are retired.

6. The client should list their marital status and whether, if previously widowed, an estate tax return for the predeceased spouse was ever filed.

7. The client should list the name, date of birth, and contact information for their children, if any, and the names and dates of birth of their grandchildren, if any.

8. If the client has children who are minors (underage), they should list the persons they have selected to be guardians for their children until they reach the age of 18, in the event of the client’s death.

9. The client should list the persons they wish to serve as executors in their Will and successor trustees in their Trust.

10. The client should list the persons they wish to serve as agents under their Health Care Power of Attorney or Advance Health Care Directive, as well as their personal funeral preferences.

11. The client should list the persons they wish to serve as agents under their Durable Power of Attorney for Asset Management.

12. The clients should list the names and contact information for their financial and legal advisors.

13. The client should describe how they wish their estate to be distributed after they pass away.

14. The client’s separate property assets should be listed, as well as the client’s jointly owned property.

15. The client’s life insurance policies should be listed, including the names of the primary and contingent beneficiaries for each policy.

16. The client’s retirement benefits, such as employer plans and/or IRAs, should be listed, including the names of the primary and contingent beneficiaries for each account.