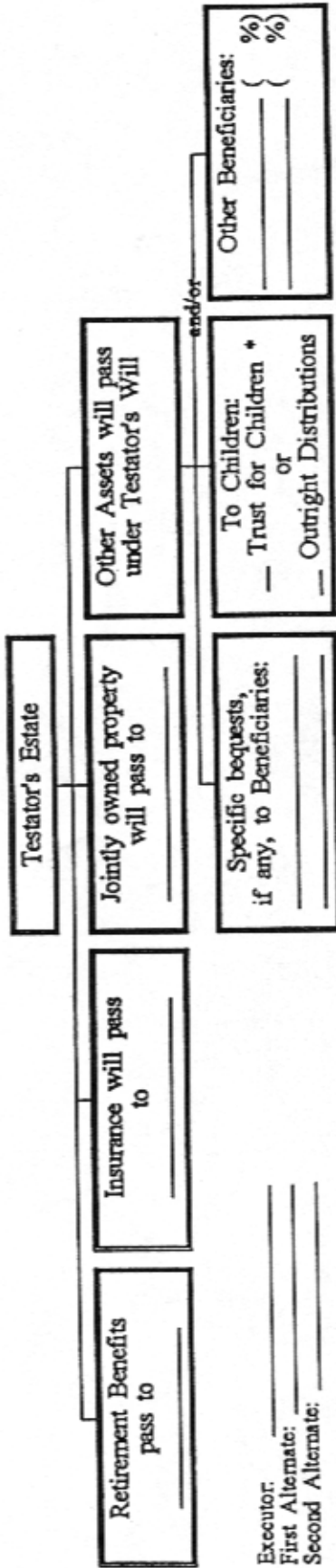


# Simple Estate Planning Flowchart

\_\_\_\_\_ Name



Testator's Estate

Retirement Benefits pass to \_\_\_\_\_

Insurance will pass to \_\_\_\_\_

Other Assets will pass under Testator's Will

Specific bequests, if any, to Beneficiaries: \_\_\_\_\_

To Children: \_\_\_\_\_ Trust for Children \*  
or  
\_\_\_\_\_ Outright Distributions

Other Beneficiaries: \_\_\_\_\_  
\_\_\_\_\_ {  
\_\_\_\_\_ % }  
\_\_\_\_\_ % }

\* Distribution Ages and Percentages, if Trust for Children:  
( \_\_\_\_\_ % ) at age ( \_\_\_\_\_ )  
( \_\_\_\_\_ % ) at age ( \_\_\_\_\_ )

- Executor: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_
- Trustee: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_
- Guardian: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_
- Power of Attorney: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_
- Physicians Directive: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_
- Medical Power of Attorney: \_\_\_\_\_
- First Alternate: \_\_\_\_\_
- Second Alternate: \_\_\_\_\_