AGING IN MAINE
A PRACTICE OF KEVIN W. WEATHERBEE LAW OFFICES, PLLC

Maine Estate Planning Worksheet & Checklist

Aging In Maine – Estate Planning Organizer

This worksheet will help you gather the information needed to create or update your estate plan.

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1. Basic Information

- Full Legal Name: ___________________________
- Date of Birth: ___________________________
- Address: ___________________________
- Phone: ___________________________
- Email: ___________________________
- Marital Status: ___________________________
- Spouse Name (if applicable): ___________________________
- Names and ages of children: ___________________________

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2. Key People to Choose

These are the people who will help carry out your plan.

Personal Representative (Executor): ___________________________
Alternate Personal Representative: ___________________________

Trustee (if you have a trust): ___________________________
Alternate Trustee: ___________________________

Guardian for Minor Children: ___________________________
Alternate Guardian: ___________________________

Agent under Financial Power of Attorney: ___________________________
Alternate Agent: ___________________________

Health Care Agent: ___________________________
Alternate Health Care Agent: ___________________________

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3. Your Assets

List everything you own.

Real Estate

- Home: ____________________________
- Camp/Cottage/Land: ____________________________
- Other Property: ____________________________

Bank Accounts

- Checking: ____________________________
- Savings: ____________________________
- Credit Union: ____________________________

Investments

- Retirement Accounts (IRA/401k): ____________________________
- Brokerage Accounts: ____________________________
- Stocks/Bonds: ____________________________

Insurance

- Life Insurance: ____________________________
- Long-Term Care Insurance: ____________________________

Personal Property

- Vehicles: ____________________________
- Boats/ATVs/Snowmobiles: ____________________________
- Valuable Personal Items: ____________________________

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4. Beneficiaries

Who do you want to receive your assets?

Primary Beneficiaries:

Alternate Beneficiaries:

Specific Gifts (if any):

5. Important Questions

Check any that apply:

☐ I want to avoid probate if possible
☐ I am concerned about long-term care costs
☐ I want to protect assets for my spouse
☐ I want to leave money to my children
☐ I have a child or beneficiary with a disability
☐ I have a blended family
☐ I own a business
☐ I own out-of-state property
☐ I want to protect my home/camp for my family
☐ I want to plan for MaineCare eligibility

6. Documents You May Already Have

☐ Will
☐ Trust
☐ Durable Power of Attorney
☐ Health Care Power of Attorney
☐ Living Will / Advance Directive
☐ Do Not Resuscitate Order
☐ Long-Term Care Insurance
☐ Life Insurance

Location of documents: ____________________________

7. Final Notes / Questions

Estate Planning Checklist

Use this checklist to see if you have a complete plan in place:

Document	Do You Have One?
Will	☐
Trust	☐
Power of Attorney	☐
Health Care Directive	☐
Guardianship Plan for Children	☐
Beneficiary Designations Reviewed	☐
Long-Term Care Plan	☐
MaineCare Planning (if needed)	☐
Asset Protection Plan	☐
Plan Reviewed in Last 3–5 Years	☐

Bring this worksheet to your consultation, and we will help you create a plan that protects you, your family, and your assets.