



## Blended Family Estate Planning Worksheet

Use this worksheet to start organizing your thoughts and preparing for your estate plan. Every family is different—this is designed to help you think through what matters most.

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### 1. Your Goals

Who do you want to provide for?

- Spouse
- Children (yours)
- Stepchildren
- Grandchildren
- Other: \_\_\_\_\_

What are your top priorities?

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### 2. Key Decision Makers

Who would you trust to handle your finances if you could not?

Primary: \_\_\_\_\_

Backup: \_\_\_\_\_

Who would you trust to make medical decisions for you?

Primary: \_\_\_\_\_

Backup: \_\_\_\_\_

### 3. Asset Distribution

How would you like your assets divided?

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Are there specific gifts you want to leave?

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Do you have concerns about fairness between family members?

Yes  No

If yes, explain:

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### 4. Family Considerations

Are there blended family dynamics to consider?

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Are there potential conflicts you want to avoid?

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Any special circumstances? (minor children, health concerns, etc.)

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## 5. Important Documents

Do you currently have:

- Will
- Trust
- Power of Attorney
- Healthcare Directive

Are these documents up to date?

- Yes  No  Not Sure
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## 6. Organization

Do you have a list of your:

- Accounts
- Insurance policies
- Property
- Important contacts

Where are your documents stored?

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Does someone you trust know how to access them?

- Yes  No
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## 7. Next Steps

What questions do you have about your estate plan?

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**What steps do you need to take next?**

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 **Need Help?**

Estate planning for blended families can be complex—but you don’t have to figure it out alone.

**Call (207) 848-5600 to schedule a consultation and create a plan tailored to your family.**

**Legal Disclaimer:** This material is for general informational purposes only and does not constitute legal advice. No attorney-client relationship is created by the use of this checklist. This checklist is not a substitute for legal counsel and should not be relied upon as a legal document.

Individuals seeking legally binding estate planning or incapacity planning documents should consult a licensed estate planning or elder law attorney in the State of Maine.