



Estate Planning Readiness Worksheet

Alzheimer's & Dementia Planning for Maine Families

This worksheet is designed to help you evaluate whether your current estate plan includes the essential documents discussed in our article, *"5 Estate Planning Documents Every Maine Family Should Have When Facing Alzheimer's or Dementia."*

Instructions: Check each item that applies to you and make notes about any updates that may be needed.

1. Durable Financial Power of Attorney

A durable financial power of attorney allows someone you trust to manage financial matters if you become unable to do so.

Do you currently have a Durable Financial Power of Attorney?

- Yes
- No
- Not sure

If yes:

Name of agent: _____

Name of backup agent: _____

Date document was signed: _____

Questions to Consider

- Is the person named still someone I trust?
- Does the document reflect my current wishes?
- Have I reviewed it within the last 3–5 years?

2. Healthcare Power of Attorney

A healthcare power of attorney allows someone to make medical decisions for you if you cannot communicate your wishes.

Do you currently have a Healthcare Power of Attorney?

- Yes
- No
- Not sure

If yes:

Name of healthcare agent: _____

Name of backup healthcare agent: _____

Date document was signed: _____

Questions to Consider

- Is my chosen agent willing and able to serve?
 - Have I discussed my healthcare wishes with them?
 - Have I reviewed this document recently?
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3. Advance Healthcare Directive

An advance healthcare directive outlines your preferences for medical care if you are unable to make decisions.

Do you currently have an Advance Healthcare Directive?

- Yes
- No
- Not sure

Questions to Consider

- Have I documented my wishes regarding life-sustaining treatment?

- Have I considered my preferences for comfort care?
 - Have I shared my wishes with loved ones?
 - Does the document still reflect my current preferences?
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4. Revocable Living Trust

A revocable living trust may help provide continuity in asset management if incapacity occurs.

Do you currently have a Revocable Living Trust?

- Yes
- No
- Not sure

If yes:

Name of current trustee: _____

Name of successor trustee: _____

Date trust was created: _____

Questions to Consider

- Are assets properly titled in the trust?
 - Is my successor trustee still the right choice?
 - Have I reviewed the trust within the last 3–5 years?
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5. Last Will and Testament

A will directs how your assets should be distributed after your death.

Do you currently have a Will?

- Yes
- No
- Not sure

If yes:

Date will was signed: _____

Name of personal representative: _____

Name of backup personal representative: _____

Questions to Consider

- Does my will reflect my current wishes?
- Have there been significant life changes since it was signed?
- Have I reviewed it within the last 3–5 years?

Notes:

Beneficiary Designation Review

Review beneficiary designations on the following accounts:

Account Type	Reviewed Recently?
Retirement Accounts	<input type="checkbox"/> Yes <input type="checkbox"/> No
Life Insurance Policies	<input type="checkbox"/> Yes <input type="checkbox"/> No
Payable-on-Death Accounts	<input type="checkbox"/> Yes <input type="checkbox"/> No
Annuities	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other Accounts	<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Planning Considerations

- My spouse or family members know where my documents are located.
 - My trusted decision-makers have copies of important documents.
 - My emergency contact information is up to date.
 - I have discussed my wishes with loved ones.
 - I know who to contact if I need to update my estate plan.
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Estate Planning Readiness Score

How many of the following do you currently have in place?

- Durable Financial Power of Attorney
- Healthcare Power of Attorney
- Advance Healthcare Directive
- Revocable Living Trust (if appropriate)
- Current Will

Total Checked: _____ / 5

4–5 Documents in Place: Great job. Consider reviewing your plan to ensure it still reflects your wishes.

2–3 Documents in Place: You have started planning, but there may be important gaps to address.

0–1 Documents in Place: Now may be a good time to speak with an estate planning attorney about creating a comprehensive plan.
