



# Maine Family Camp Planning Worksheet

For Maine families thinking about the future of a camp, cottage, cabin, or seasonal property.

A family camp can hold years of memories, but it can also raise difficult questions about ownership, expenses, repairs, use, and what happens when the next generation does not all agree. Use this worksheet to organize your thoughts before meeting with an estate planning attorney.

## 1. Basic Camp Information

Camp location/address: \_\_\_\_\_

Town: \_\_\_\_\_

County: \_\_\_\_\_

Type of property:

- Lake camp
- Hunting camp
- Coastal cottage
- Cabin
- Seasonal home
- Other: \_\_\_\_\_

Is the camp used year-round or seasonally?

\_\_\_\_\_

Who currently uses the camp most often?

\_\_\_\_\_

## 2. Current Ownership

Who owns the camp now?

\_\_\_\_\_

How is the camp currently owned?

- Individual ownership
- Joint ownership
- Married couple
- Siblings or family members together
- Trust
- LLC
- Unsure

Where is the deed kept?

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Is there a mortgage, loan, or lien on the property?

- Yes
- No
- Unsure

Notes about current ownership:

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### 3. Who Wants to Keep Using the Camp?

List the family members who may want to use, inherit, or help manage the camp in the future.

Name	Relationship	Wants to Use Camp?	Willing to Help Pay?
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Does anyone prefer to receive something other than an interest in the camp?

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## 4. Expenses and Maintenance

Who currently pays the camp expenses?

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Common expenses to consider:

- Property taxes
- Insurance
- Utilities
- Road or association fees
- Dock or waterfront maintenance
- Septic, well, or plumbing
- Roof, foundation, or structural repairs
- Opening and closing the camp
- Snow removal or seasonal access
- Other: \_\_\_\_\_

Who handles repairs or maintenance now?

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What repairs may be needed in the next few years?

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How should expenses be shared in the future?

- Equally among owners
- Based on use
- Paid by one person
- Paid from a shared camp fund
- Unsure
- Other: \_\_\_\_\_

## 5. Scheduling and Use

How is camp use currently scheduled?

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What times of year matter most to the family?

- Memorial Day weekend
- Fourth of July
- Summer vacation weeks
- Labor Day weekend
- Hunting season
- Holidays
- Other: \_\_\_\_\_

Should there be rules about:

- Guests?  Yes  No  Unsure
- Pets?  Yes  No  Unsure
- Renting the camp?  Yes  No  Unsure
- Boats or recreational equipment?  Yes  No  Unsure
- Cleaning before leaving?  Yes  No  Unsure
- Quiet hours or neighbor issues?  Yes  No  Unsure

Use or scheduling concerns:

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## 6. If Someone Wants Out

What should happen if one family member no longer wants to be involved?

- Other family members should have the first option to buy them out
- The camp should be sold
- The person can transfer their share to their children
- The person can sell to anyone
- Unsure
- Other: \_\_\_\_\_

How should the value of a share be determined?

- Appraisal
- Agreed family value
- Tax-assessed value
- Formula in a written agreement
- Unsure

Should payments be allowed over time?

- Yes
- No
- Unsure

Notes about buyout or sale concerns:

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## 7. Family Concerns

What worries you most about the future of the camp?

- Family conflict
- One person doing all the work
- Unequal use
- Unequal payments
- Repairs becoming too expensive
- Someone wanting to sell
- Camp being lost because of long-term care costs
- Unclear ownership after death
- Hurt feelings or resentment
- Other: \_\_\_\_\_

What would a good outcome look like for your family?

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What conversations need to happen soon?

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## 8. Questions for an Estate Planning Attorney

Use this space to write down questions before your appointment.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## 9. My Top Three Next Steps

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Need Help Planning for a Maine Family Camp?

Aging In Maine helps families think through practical estate planning questions for camps, cottages, cabins, and seasonal properties.

Call Aging In Maine at **(207) 848-5600** to schedule a consultation.

**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.