

THE ESTATE PLANNING PLAYBOOK

Clear wishes. Prepared people. One place to begin.

YOUR OUTCOME

Organize the people, documents, and decisions your family would need if you could no longer explain the plan yourself.

12 pages of practical guidance, printable worksheets, and next steps.

Start with what you know. Bring the unanswered questions to your estate planning professional.

Educational planning workbook. This is not a will, trust, power of attorney, or advance directive. Completing it does not create legal authority or change beneficiaries. Have legal documents and decisions reviewed for your state and circumstances.

BUILD A PLAN YOUR FAMILY CAN FOLLOW.

Estate planning connects your wishes with the people and documents needed to carry them out. Start with the areas that matter most to your household.

Your route	Pages	What you will prepare
People and priorities	3-4	A family priorities list and a decision-maker map.
Documents and care	5-6	A document inventory and questions about future care.
Property and beneficiaries	7-8	An asset map and a review list for beneficiary forms.
Family instructions	9-10	A secure records map and a professional meeting agenda.
Put it into action	11-12	A 30-day plan and resources for the next conversation.

Already have a trust? Use this guide for the broader family plan. Use the Protect - Trust Activation Playbook alongside it for trust funding, titles, and activation tasks.

Use names or initials and account categories only. Keep passwords, Social Security numbers, account numbers, and detailed medical information in a secure system, outside this workbook.

WHAT DO YOU WANT TO MAKE EASIER?

Write a short answer for each prompt. These are discussion notes; they do not replace formal instructions in legal documents.

The people or causes I want my plan to support:

The three things I most want my family to understand:

Children, dependents, pets, or family circumstances needing extra planning:

The decision I would most like to settle this month:

Discuss minor children, blended families, disability benefits, business ownership, and property in more than one state with your attorney before choosing documents or beneficiaries.

WHO WOULD STEP IN?

Different jobs may call for different people. Ask each person about willingness and availability, choose a backup, and have the proper authority documented.

Role to discuss	First choice	Backup / question
Executor / personal representative		
Trustee / successor trustee		
Financial agent under a power of attorney		
Health care agent / proxy		
Guardian nomination for minor children, if applicable		
Family contact / pet care helper		

A worksheet or emergency contact listing does not give someone legal authority. Ask your attorney which role covers each task and when that authority begins and ends.

KNOW WHAT YOU HAVE. FIND WHAT IS MISSING.

Mark each document as current, needs review, missing, or not applicable. Your professional can help determine what belongs in your plan.

Document / purpose	Status	Location / review date
Will: instructions for property handled through your estate.		
Trust, if appropriate: instructions for property held in the trust.		
Financial power of attorney: authority for an agent to act within its terms.		
Health care directive / proxy: care preferences and a decision-maker.		
Beneficiary forms: instructions held by account and policy providers.		
Supporting records: deeds, insurance, business agreements, and advisor contacts.		

Ask which signatures, witnesses, notarization, and storage steps apply in your state. Do not sign a generic form without understanding its effect.

MAKE YOUR WISHES KNOWN.

Advance care planning begins with a conversation about what matters to you. A health care professional can explain the medical choices, and state-appropriate documents can record your preferences.

What matters most to my quality of life?

Who understands my values and could speak for me?

What questions do I want to ask my health care professional?

Who should receive a copy of my completed directive?

Review your wishes as life changes. Tell the people involved where the current document is kept, and ask how to replace outdated copies.

Source: National Institute on Aging, [Tips for Advance Care Planning](#) (linked on page 12).

CONNECT PROPERTY WITH THE PLAN.

List the category and provider, how it is owned today, and the question you need answered. Ask for review before changing ownership or beneficiary instructions.

Asset / provider	Owner today	Transfer instruction / question
Home / other real estate		
Bank / brokerage accounts		
Retirement accounts		
Life insurance / annuities		
Business interests		
Personal / digital property		

A will, trust, joint ownership, and beneficiary designation are different ways property may pass. Have your attorney and providers confirm which applies to each asset. Do not assume signing a trust moves property into it.

CHECK THE NAMES ON THE FORMS.

Request current beneficiary records directly from each provider. Compare those records with your intentions and flag gaps for professional review.

Account / policy	Primary beneficiary	Backup / review needed

Review prompts

Are names and contact details current? Do the percentages match the intended allocation? Is a backup named? Have marriage, divorce, births, or deaths changed the plan?

Get advice before naming a minor, a person receiving means-tested benefits, your estate, or a trust. Retirement accounts and insurance can have distinct tax and distribution rules. Writing a name here does not update a provider's records.

MAKE THE RIGHT RECORDS FINDABLE.

Create a map to the records, not a pile of sensitive details. Keep originals and access instructions secure, and tell the appropriate people how to locate them.

What to locate	Secure location / person to contact
Current signed estate documents	
Attorney, tax professional, and financial contacts	
Insurance policies and account inventory	
Property and business records	
Digital asset access instructions	
Personal wishes and care instructions	

For digital accounts, discuss platform legacy-contact settings and lawful access with your attorney. Do not put passwords or recovery codes in a shared workbook.

The person I will walk through this records map with:

BRING QUESTIONS THAT MOVE YOU FORWARD.

Take your completed pages, your current documents, and the questions below to your estate planning attorney. Involve tax and financial professionals where needed.

- Which documents fit my family, state, and property?
- Who can act during incapacity, and who handles matters after death?
- How should children or dependents be provided for?
- Do ownership records and beneficiary forms match the plan?
- If a trust fits, who will handle funding and verify completion?
- What state-specific signing or recording steps apply?
- What is included in the fee, and what follow-up costs should I expect?
- When should I return for a review?

My most important unanswered question:

TURN THE WORKSHEETS INTO NEXT STEPS.

Choose realistic steps. Document preparation and legal review may take longer than 30 days; use this month to organize the work and confirm responsibilities.

When	Action	Owner / target date
Week 1	List priorities, gather existing documents, and inventory assets.	
Week 2	Talk with proposed decision-makers and request beneficiary records.	
Week 3	Meet with the appropriate professionals and record the agreed next steps.	
Week 4	Follow up on documents, provider updates, and secure storage instructions.	

My first action, owner, and date:

My next review date and life changes that should trigger an earlier review:

GET HELP WITH THE PART THAT IS NEXT.

Bring the unfinished worksheet and your questions. Mark and his team can help you explore estate planning support through appropriately authorized professionals.

Explore your estate planning next step

myestate.legacywealthco.com

Book a 15-minute discovery call with Mark

Open the Mark Cassara Discovery Call calendar

OFFICIAL READING

CFPB - What is a power of attorney?

CFPB - Managing someone else's money

National Institute on Aging - Tips for Advance Care Planning

The Florida Bar - The Revocable Trust in Florida (Florida-specific)

Prepared October 2026. This guide provides general education and organization prompts, not individualized legal, tax, investment, or insurance advice. Laws and requirements vary by state and circumstances. Legal document preparation, professional services, and any related fees are separate from this playbook purchase.