

COUPLES WORKSHEET

Estate Planning Pre-Meeting Worksheet

This worksheet helps couples think through key estate planning decisions. It's not required, but it can help you:

- Get familiar with the choices you'll need to make
- Talk through important decisions with your spouse or partner
- Gather key details before starting on wealth.com

Make the process smoother by preparing in advance. You'll be asked to decide things like:

- Who should inherit your assets and in what amounts
- Who should manage your finances and make medical decisions if you can't
- Who should care for your children if both parents are unavailable

You don't have to fill out everything ahead of time. The platform will walk you through the process and explain things as you go.

QUESTION 1: PRIMARY HEIRS (LIKELY SPOUSE)

Who do you want to receive the bulk of your assets when you pass away? Most people name a single primary heir—typically their spouse—but you can choose to divide your assets among multiple beneficiaries.

If you choose more than one person, you'll need to decide how to divide your assets by percentage. *This applies to the remaining assets in your estate (your residuary estate), which may not always be easy to split evenly.*

Primary Heir 2 (Optional): If you want to name more than one primary heir, you'll need to decide how to divide your assets by percentage. Note that naming multiple primary heirs is uncommon. If you're in a blended family, you may want to consider alternatives, such as a Marital Trust or a specific gift (see Question 4) instead of dividing your residuary estate.

PRIMARY HEIR 1

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

RELATIONSHIP



ALL

vs.

 PERCENTAGE

PRIMARY HEIR 2

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

RELATIONSHIP



ALL

vs.

 PERCENTAGE

QUESTION 2: WOULD YOU CONSIDER A MARITAL TRUST?

A Marital Trust can help protect assets for your spouse while ensuring they are ultimately passed down as you intend.

Check any that apply:

- You have children from a previous relationship and want to guarantee their inheritance
- You are concerned about elder abuse and want safeguards in place
- You want to protect assets from creditors or lawsuits that could affect your spouse
- You are a business owner and want liability protection for assets your spouse may need

If you checked any of these boxes, you may want to consider a Marital Trust.

PRIMARY HEIR 1

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

RELATIONSHIP



ALL

vs.

 PERCENTAGE

QUESTION 3: SECONDARY BENEFICIARY(IES)

If your primary beneficiary passes away before you, who should receive your assets? This person is known as your secondary beneficiary (or remainder beneficiary).

Note: Naming a secondary beneficiary is only necessary if you want to bypass the legal order of inheritance in case all of your named beneficiaries pass away before you. If you don't name one, state law will determine who inherits, typically in this order:

- Your children (if applicable)
- Your parents
- Your siblings
- Your nieces and nephews
- Extended family (e.g., cousins)

Since this scenario is uncommon, most people don't need to worry about naming an ultimate beneficiary. However, if you prefer your assets to go to a specific person—such as a sibling or a niece/nephew—before a parent, you may want to name a secondary beneficiary.

SECONDARY BENEFICIARY

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

RELATIONSHIP



ALL

vs.

 PERCENTAGE

QUESTION 4: SPECIFIC GIFTS (OPTIONAL)

Do you want to leave a meaningful personal item or a specific amount of money to someone?

These gifts—such as jewelry, collectibles, or a set dollar amount—are distributed before the rest of your estate. Most people don't make specific gifts, but they can be a way to recognize sentimental items or ensure a person or charity receives something special. If you were considering naming someone as a second primary heir just to leave them something, a specific gift may be a better alternative.

If you want to leave a specific gift, list the item or amount, along with the recipient's name.

GIFT ONE

ASSET NAME

TYPE

INDIVIDUAL RECIPIENT

FIRST NAME

LAST NAME

CHARITY RECIPIENT

ORGANIZATION LEGAL NAME

EIN #

HEADQUARTERS STATE

CITY

QUESTION 5: FINANCIAL DECISION MAKERS

Who do you trust to handle your finances if you are unable to manage them yourself? Choose at least one person (ideally two). Consider whether the same person should serve in all of these roles or if different people are better suited for each. Also, think about who should be the backup if your first choice is unavailable.

This person may serve in one or more roles:

- Executor: Handles the settlement of your estate after you pass away.
- Trustee: Manages any trusts you create for the benefit of others.
- Financial Power of Attorney (FPOA): Manages your financial affairs if you become incapacitated.

Additional Considerations:

- I want my financial agent's authority to begin only if I become incapacitated. (Note: Delaying authority can create hurdles, as financial institutions may require proof of incapacity before granting access, potentially causing delays.)
- I want my financial agent to have full authority over my financial matters.
- I want my financial agent to have only limited authority over specific financial matters.
- I want my financial agent to have the power to make gifts or donations on my behalf.
- I want my financial agent to have authority over my digital assets, including online accounts and cryptocurrency.
- I want to nominate a conservator in advance in case a court needs to appoint one.

FIRST PERSON

FIRST NAME

LAST NAME

ADDRESS

PHONE NUMBER

SECOND PERSON

FIRST NAME

LAST NAME

ADDRESS

PHONE NUMBER

QUESTION 6: MEDICAL DECISION-MAKERS AND TREATMENT PREFERENCES

Who do you trust to make medical decisions for you if you cannot make them yourself? Choose at least one person (ideally two). Consider whether the same person should serve in all roles or if different people are better suited for each. Also, think about who should be the backup if your first choice is unavailable.

This person may serve in one or both roles:

- **Health Care Agent** – Makes medical decisions on your behalf if you cannot.
- **Guardian** (if needed for you) – If a court determines you need a guardian, this person can be nominated in advance.

Decision Points:

- **When should your health care agent's authority begin?**

- Immediately
- Only if I become incapacitated (Note: Delaying authority can create hurdles, as medical providers may require proof of incapacity before allowing decisions to be made.)

- **Should your health care agent make decisions only within the limits of your stated preferences, or should they have flexibility?**

- Must follow my stated preferences only
- Can use their judgment to act in my best interests

FIRST PERSON

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

EMAIL ADDRESS

SECOND PERSON

FIRST NAME

LAST NAME

ADDRESS

DATE OF BIRTH

EMAIL ADDRESS

QUESTION 7: MEDICAL TREATMENT PREFERENCES

If you are in a terminal condition or a permanent unconscious state, what are your preferences for medical treatment?

- I want all available medical treatments to prolong my life, including CPR, ventilators, and artificial nutrition and hydration.
- I do not want life-prolonging treatments, but I want comfort care, including pain management.
- I want to specify certain treatments I do or do not want (e.g., CPR, feeding tubes, ventilators).

Additional considerations:

Do you want to be an organ donor, and do you authorize your health care agent to make decisions regarding organ donation?

- Yes
- No

Do you authorize your health care agent to make decisions about autopsy?

- Yes
- No

Do you authorize your health care agent to decide the final disposition of your body (e.g., burial or cremation)?

- Yes
- No

Do you authorize your health care agent to make decisions regarding your reproductive genetic material if you are incapacitated or after your death?

- Yes
 - No
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QUESTION 8: GUARDIAN FOR MINOR CHILDREN

Who do you trust to raise your child(ren) if both you and the other parent are unable to do so? Choose at least one person (ideally two).

A guardian is responsible for the care, upbringing, and well-being of your child(ren) if both parents are unable to do so. This includes decisions about education, health care, and daily life. If you do not name a guardian, the court will decide who should take on this role, which could lead to delays or conflicts among family members.

You can also name a backup guardian in case your first choice is unable or unwilling to serve. This ensures there is a clear plan in place if circumstances change.

FIRST PERSON

FIRST NAME

LAST NAME

SECOND PERSON

FIRST NAME

LAST NAME

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