



We congratulate you on taking the first steps in addressing your estate planning needs. This worksheet will help you address questions that you may or may not have thought about if you are deceased or unable to make health care or financial decisions for yourself. When completing the below, name 3 people in case one or more person is not available to serve.

If you are married, will your spouse be the first person to make decisions for you if you become incapacitated. YES or NO

If you have minor children, name the person you would trust to care for them if you are incapacitated or are deceased?

- 1.
- 2.
- 3.

Who would make financial decisions for your minor child/children until they reach the age you designate them to manage their inheritance on their own.

- 1.
- 2.
- 3.

At what age do you feel your minor children could manage the inheritance you left them when you are deceased? (the money could be left in trust and managed by the trustee until the age you choose)

Who would handle your financial decisions if you are incapacitated or unable to make decisions for yourself?

- 1.
- 2.
- 3.

Who would make health care or medical decisions for you if you are incapacitated?

- 1.
- 2.
- 3.

Pyke &  
Associates, P.C.

340 Corporate Center  
Court, Stockbridge  
GA 30281

770-507-2500  
[www.cpyke.com](http://www.cpyke.com)

*Helping people to be good stewards of all  
that as been entrusted to them.*



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If you are unable to communicate your health care wishes because you are in a state of permanent unconsciousness or you are at the end of life with a terminal condition and the doctors tell your health care agent you have a short time to live, do you wish to be kept alive by artificial means or any other means?

Yes or No

Write the names of the people who you want to receive assets from your estate and what percentage do you want them to get?

Do you wish to be Buried? Yes or No

Do you wish to be Cremated? Yes or No

Is your estate more than \$500,000 (including life insurance, IRA's, 401(k), real estate, bank accounts, stocks, bonds, etc.)

Yes or No

What other questions do you have for the attorney?

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