STELLARUS PRESS

Gathering What Matters

An Attorney-Client Companion Workbook

ESTATE LAW EDITION

A calm, private place to gather the people you trust, the wishes you hold, the property you own, and the records your attorney will need.

STELLARUS PRESS

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This workbook is an information-gathering and preparation tool. It does not itself create, amend, revoke, or transfer any legal right, document, account, or property. It does not provide legal, tax, or financial advice, and using it does not create an attorney–client relationship unless you have a separate signed engagement agreement.

The rules for wills, trusts, powers of attorney, health-care directives, beneficiary designations, and related documents vary by state and change over time. Before you sign anything, have a licensed attorney in your state review your documents.

Companion artwork appears throughout this workbook; see "A Note on the Artwork" at the back.

FIRST EDITION

THIS WORKBOOK

Belongs to ______________________________

I'm using it to get ready to make or update ______________________________

a will, a living trust, powers of attorney, a health-care directive, or something else

Date started ______________________________

How to Use This Workbook

This workbook is a private place to gather the pieces of an estate plan — the people you trust, the wishes you hold, the property you own, and where each important record lives. You do not need to know the law before you begin. Write down the facts and your wishes first; the legal drafting comes later.

1 **One part at a time**
Each part covers one piece of the plan. First you read a short, plain page about what it is. Then you write down your own facts and wishes.

2 **Gather, don't finalize**
This is a place to organize what you own and what you want — not to sign or finalize legal documents. What is binding, and exactly how it should be worded, depends on your state and your facts. Bring what you gather to your attorney.

3 **Note where each record lives**
When a part points to a document, an account, or a deed, note it here, then record it in the Documents & Records Log so you — and the people you trust — can find it again.

4 **Write while you can, and keep it private**
The best time to write your wishes down is while you are well and able to decide. Keep this workbook somewhere private, and tell one trusted person where it lives.

5 **Skip what doesn't fit**
Not every part applies to every person or every plan. Use what helps; leave the rest blank.

This workbook is general and educational. It is designed to gather information your attorney may use while preparing or updating your estate plan.

What's Inside

SECTION ONE

What You're Gathering

Each part of your plan, gathered clearly

This is the heart of the workbook. Each part starts with a short, plain page about what it is — then a calm place to write down your own people, wishes, and property. You do not have to decide yet what is legal or how a final document should read. Gather first; make it official later.

Your Plan at a Glance

A MAP OF WHAT YOU'RE GATHERING

PART	FITS ME?	GATHERED?	ASKED MY ATTORNEY?
A You & your home	☐	☐	☐
B Your people (the team)	☐	☐	☐
C Health-care wishes	☐	☐	☐
D Financial authority	☐	☐	☐
E Family & who receives what	☐	☐	☐
F Your property (Schedule A)	☐	☐	☐
G Documents you already have	☐	☐	☐

Check a box when a part fits, when you've written down your facts, and when you've raised it with your attorney. Skip any that don't apply — most plans don't use every part.

Words You Might Use

These are only prompts — plain names for things you may already know. Use whatever words fit you; the exact legal wording is your attorney's part.

DOCUMENTS PEOPLE OFTEN MAKE

a will · a living trust · a durable power of attorney · a health-care directive · a HIPAA authorization

PEOPLE YOU MIGHT NAME

a health-care agent · a financial agent ("attorney-in-fact") · a successor trustee · an executor · a guardian

WISHES YOU MIGHT WRITE DOWN

who decides for you · the care you would want · who receives what · who raises your children · what happens to your home

WHERE RECORDS LIVE

a home safe or file · a bank or safe-deposit box · a lawyer's office · a county recorder · a cloud folder

PART A

You & Your Home

This part gathers the basics — your legal name, how to reach you, and where you live. It is the foundation every other document is built on, so it is worth getting exactly right.

If you have moved recently — or plan to move — note both where you are now and where you expect to be. A move can affect how documents are reviewed, updated, or re-signed, and it is helpful for your attorney to understand the full picture.

There are no trick questions here. Write what is true today; you can always update it later.

You & Your Home

Your full legal name: ______________________________

Other names you've used (maiden, nicknames): ______________________________

Date of birth: ______________ Phone: ______________________________

Email: ______________________________

Your current-home address:

____

____

If you are moving — your destination address *(write "TBD" if you don't know it yet)*:

____

Where you vote, pay taxes & are licensed (if different): ______________________________

Roughly when you moved, or plan to: ______________________________

How this helps your attorney

These facts help your attorney identify you correctly, understand where you live, and see whether a move or multi-state connection should be part of the planning conversation.

PART B

Your People

These are the people you trust to act for you — for your health, your money, your property, and, if you have young children, their care. Naming them is one of the most personal choices in the plan.

The same person may serve in more than one role, but that is not required. Choose the right person for each job: someone who will show up, act in your interest, and communicate well when needed.

Pick a first choice and a backup for each role. It is a kindness to ask each person before you write their name down.

Your People

For each role, a first choice and a backup. It's fine to name the same person for more than one role.

HEALTH-CARE AGENT — decides care if you can't speak

FIRST CHOICE — NAME	RELATIONSHIP	PHONE / EMAIL
BACKUP — NAME	RELATIONSHIP	PHONE / EMAIL

FINANCIAL AGENT ("ATTORNEY-IN-FACT") — handles money & property

FIRST CHOICE / BACKUP — NAME	RELATIONSHIP	PHONE / EMAIL

SUCCESSOR TRUSTEE

EXECUTOR OF YOUR WILL

GUARDIAN FOR MINOR CHILDREN (IF ANY) — first choice & backup

If any roles are different, that's okay. Use Part G or the margins to note anything your attorney should know about why you chose each person.

PART C

Health-Care Wishes

This part is about medical decisions — who speaks for you, and what you would want, if you ever cannot speak for yourself.

These documents only step in if you cannot make or share a decision. You stay in charge for as long as you are able to decide for yourself. Writing your wishes down now is a genuine kindness to the people who would otherwise have to guess.

You do not have to have every answer. Note what you know, mark what you are unsure about, and leave the rest for a conversation with your doctor, your attorney, and the people you trust.

Making Your Choices

Answer in your own words. Your attorney and doctor will help turn these into the exact language a directive may need.

When should your agent's authority begin — right away, or only if a doctor finds you can't decide?

If your condition were terminal or you were permanently unconscious, would you want care focused on comfort, or on prolonging life by all available means?

Your wishes about a feeding tube and fluids (nutrition & hydration):

Your wishes about pain relief, even if it might make you drowsy:

Any other wishes — spiritual or personal, or who you'd want near you:

People & Details

Your health-care agent (from Part B) is: ______________________________

Your primary doctor & clinic, if you have one: ______________________________

Anyone besides your agent who should be allowed your medical information (for example, a spouse, partner, or adult child):

____

____

Would you like to be an organ or tissue donor?

☐ Yes ☐ No ☐ Undecided — leave it to my agent

Any limits on the gift (e.g. for transplant only): ______________________________

How this helps your attorney

Your answers help your attorney prepare and discuss your health-care documents. They do not themselves create or sign a directive.

Notes

FOR YOUR OWN THOUGHTS

PART D

Financial Authority

A durable power of attorney lets someone you trust handle money and property for you — paying bills, managing accounts, dealing with your home, or handling practical matters — if you cannot.

You choose when it starts. Some people make it effective right away, so their agent can step in smoothly; others make it effective only if a doctor finds they cannot manage on their own. Your attorney can help you weigh the benefits and tradeoffs.

Some powers deserve special attention: gifts, real estate, trust funding, beneficiary changes, taxes, business matters, and digital access. Note what you think you may want so nothing important is left unclear.

Your Choices & Powers

When should it take effect?

☐ Right away ☐ Only if a doctor finds I can't manage

Powers you'd want your agent to discuss with my attorney *(check any that may fit)*:

☐ Pay bills & manage bank accounts
☐ Buy, sell, or manage real estate
☐ Make gifts on my behalf
☐ Handle taxes
☐ Handle digital accounts
☐ Manage investments
☐ Fund or manage my living trust
☐ Change beneficiary designations
☐ Operate or manage a business
☐ Deal with retirement accounts

Any limits, or special instructions for your agent:

How this helps your attorney

Your answers help identify what powers you may want to grant and what questions should be discussed before a final document is prepared.

PART E

Family & Who Receives What

This part is about the people in your life and what you would like them to receive. It helps your attorney understand your family, your priorities, and any special situations that should be handled thoughtfully.

If you have young children, this is also where you note who you would want to raise them. If you are intentionally leaving someone out, it is helpful to say so clearly, so it reads as a choice and not an oversight.

Your Family

Marital status: ____________________ Spouse / partner's name: ______________________________

Your children (names & ages), or write "none":

____

____

Guardian for minor children (same as Part B?): ______________________________

Any stepchildren, prior marriages, dependents, or special family circumstances your attorney should know about:

____

Anyone you are intentionally *not* providing for *(a choice, not an oversight — naming it helps)*:

____

A pet you'd want cared for, and by whom: ______________________________

How this helps your attorney

Family facts help shape your will, trust, guardianship nominations, and any other plan elements that depend on your relationships and responsibilities.

Who Receives What

Who should receive the rest of your estate (the "residue"), and in what shares? Shares should add up to 100%.

BENEFICIARY	RELATIONSHIP	SHARE %
TOTAL		100%

Specific gifts — a particular item to a particular person:

Hold a young person's share until age ________ *discuss an age with your attorney*

A gift takes effect only if they outlive me by ________ days

Who Receives What

Who should receive the rest of your estate (the "residue"), and in what shares? Shares should add up to 100%.

BENEFICIARY	RELATIONSHIP	SHARE %
TOTAL		100%

Specific gifts — a particular item to a particular person:

Hold a young person's share until age ____________ *discuss an age with your attorney*

A gift takes effect only if they outlive me by ____________ days

PART F

Your Property

This part is an inventory — a plain list of what you own and where it lives. It helps your attorney see the broad shape of your estate and what additional information or transfers may need attention.

Some assets pass under a trust or a will; some pass by title, beneficiary designation, or another rule. The goal here is not to decide every legal consequence now, but to make sure nothing important is overlooked.

List what you can from memory now; full account numbers can wait.

What to Gather

A checklist of the usual kinds. You don't need them all — just the ones you have.

- **Bank accounts** — checking, savings, credit union.
- **Investments** — brokerage accounts, stocks, bonds.
- **Real estate** — your home and any other property.
- **Retirement & life insurance** — 401(k), IRA, pensions, policies.
- **Vehicles & titled property** — cars, boats, trailers.
- **Business interests** — a company, a share, a partnership.
- **Digital assets** — email, photos, cryptocurrency, online accounts.
- **Personal items of value** — jewelry, art, collections, heirlooms.

Schedule A — Your Property

A RECORD, NOT A TRANSFER

One line per asset. The last columns are reminders for the conversation with your attorney — how the asset is held now and whether ownership or beneficiary treatment should be reviewed.

ASSET & WHERE IT LIVES	HOW IT'S TITLED NOW	OWNERSHIP / TRUST REVIEW?	BENEFICIARY REVIEW?
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐

How this helps your attorney

This list helps your attorney identify what you own, how it may be held, and what follow-up questions or transfer steps may need to be discussed.

Schedule A — Your Property *(continued)*

Continued from the previous page. Keep listing one asset per line.

ASSET & WHERE IT LIVES	HOW IT'S TITLED NOW	OWNERSHIP / TRUST REVIEW?	BENEFICIARY REVIEW?
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐

PART G

Documents You Already Have

If you have made a will, a trust, a power of attorney, a directive, or beneficiary designations before — in this state or another — list them here. New documents often replace old ones, but only when that is done carefully and in the right order.

Also list anything with a payable-on-death or transfer-on-death designation. These can matter a great deal and should be reviewed alongside the rest of the plan.

What You Already Have

Prior will(s) — date & where the original is: ______________________________

Prior trust(s): ______________________________

Prior power(s) of attorney — financial / medical: ______________________________

Prior health-care directive(s): ______________________________

Beneficiary designations (retirement, life insurance, POD/TOD):

____

____

Anything to coordinate, replace, or discuss with your attorney:

____

How this helps your attorney

This helps your attorney see what already exists, what may need to be reviewed or updated, and whether any documents or beneficiary designations should be coordinated with your current plan.

SECTION TWO

Putting It Together

Your answers, gathered into one clear map

You have gathered the pieces. This section shows how they fit together — which answers may inform which documents, and the order that often helps keep everything organized. It is a map, not a legal opinion; your attorney turns the map into actual advice and drafted documents.

What Feeds What

YOUR ANSWERS → YOUR DOCUMENTS

One set of answers may help inform several documents. This is why the same names, facts, and wishes should stay coordinated.

DOCUMENT	BUILT FROM	DRAFTED?	N/A
Health-care directive	Parts B · C	☐	☐
HIPAA authorization	Parts B · C	☐	☐
Financial power of attorney	Parts A · B · D	☐	☐
Living trust	Parts A · B · E · F	☐	☐
Pour-over will	Parts A · B · E	☐	☐
Property / transfer review	Part F	☐	☐
Guardian nomination	Parts B · E	☐	☐

Check "drafted" once you and your attorney have a version of each. Not every plan needs every document.

The Order of Operations

1 **Gather**

Fill in this workbook — the people, the wishes, the property, the existing documents.

2 **Review**

Bring it to a licensed attorney in your state, who reviews the facts and drafts the documents that fit.

3 **Sign**

Each document, in front of the right witnesses or notary, if required.

4 **Transfer or update where needed**

Titles, deeds, beneficiary forms, and related records may need follow-up steps after the documents are drafted.

5 **Store & share**

Keep originals safe but reachable; give copies to the people who need them; tell your trusted people where the originals live.

6 **Keep current**

Review after any big change in life, family, property, or residence.

A short professional review now is often the easiest way to avoid confusion later.

SECTION THREE

Where Your Documents Live

The map of records, originals, and copies

An estate plan only helps if the people you trust can find it. This log keeps one line per document — what it is, where the original lives, and who has a copy — so nothing important is lost at the moment it is needed.

Documents & Records Log

WHAT · WHERE · WHO HAS A COPY

DOCUMENT	DATE SIGNED	WHERE THE ORIGINAL LIVES	COPIES TO

Keep originals in one safe, reachable place — and note who else knows where it is. Copies are for sharing; the original is what gets signed and stored.

Key People to Reach

The people who might need to act, gathered in one place — so no one has to go searching at a hard moment.

Your attorney: ______________________ Phone / Email: ______________

Health-care agent: ______________________ Phone / Email: ______________

Financial agent: ______________________ Phone / Email: ______________

Successor trustee: ______________________ Phone / Email: ______________

Executor: ______________________ Phone / Email: ______________

Where this workbook & your originals live

____

____

Tell at least one trusted person this location. Do not write passwords, PINs, complete account numbers, Social Security numbers, or security-question answers in this workbook.

SECTION FOUR

Questions, Updates & Help

The final review pages

This last section helps you bring the right questions to your review, keep your plan current, and remember where to turn for help when you are ready to move from gathering information to putting a plan in place.

Questions for Your Attorney

A ready-made list, drawn from the choices in this workbook. Check each as you discuss it.

- [ ] Which state's rules apply to each document I may need?
- [ ] How is each document signed to be valid here — witnesses, a notary, or both?
- [ ] Should my financial power of attorney be effective now, or only upon incapacity?
- [ ] Do my gift, property, trust, and beneficiary choices fit together the way I intend?
- [ ] How should my home and any out-of-state property be handled?
- [ ] Are any existing documents still useful, or should they be replaced or coordinated?
- [ ] Are my beneficiary forms (retirement, life insurance, POD/TOD) consistent with the rest of my plan?
- [ ] Are there any family, tax, business, digital, or special-needs issues I should address more specifically?

Your answers here are facts and wishes. Whether they are legally sound — and exactly how to word them — is your attorney's part.

Keeping It Current

A plan is a living thing. Review it when life changes — and when you update one document, review the others that should stay in step with it.

- A move to a new state
- Marriage, divorce, or a new partner
- A birth or adoption, or a child reaching adulthood
- A death among the people you named
- A big change in property, a home, or a business
- A major change in health or care wishes
- Every few years, even if nothing has changed

Next review date: ______________________ What to revisit: ______________________

Where to Get Help

This workbook helps you gather; these can help you move forward.

- **A licensed estate-planning attorney in your state** — drafts, reviews, and finalizes your documents.
- **Your state or local bar association** — lawyer-referral services, often low-cost for a first meeting.
- **Legal aid and senior-services nonprofits** — free or low-cost help in many areas.
- **A notary public** — can verify identity and witness or acknowledge a signature when a document requires notarization.
- **Your health-care providers** — can help you think through care wishes and related questions.

Nothing here is legal advice. Laws, and the way documents must be signed, vary by state and change over time; have your documents reviewed before you sign.

"Plan for what it is difficult while it is easy, do what is great while it is small."

— Sun Tzu, The Art of War

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