



For When I Fossilize: A Field Guide for Estate Planning

Do not return this workbook to The Nat! This is nothing more than a tool to help with your estate planning preparation. Fill in the blanks and bring it with you when you meet with your estate planning professional.

Step 1: Important Information

Time to gather your important information, including personal and financial information, expected beneficiaries, family care, digital passwords, where the coupons are, and other important documents. Documenting this information will be helpful as you put together a legal plan and leave a roadmap for your executor or personal representative.

Personal information:

Name _____ Phone _____

Birth Date _____ SSN _____

Address _____

Family information:

Current Marital Status: Single Married Widowed Divorced

Spouse's Name _____

Social Security Number _____ Birth Date _____

Do you have any children? (List children below):

Name _____ Birth Date _____ SSN _____

Former Spouse's (if any):

Name _____ Divorce Dates _____

Joint Children:

Name _____ Birth Date _____ SSN _____

Name _____ Birth Date _____ SSN _____

Name _____ Birth Date _____ SSN _____

Do you have legal custody of all your children? Yes No

If no, who has custody? (List Child, Custody Holder, Relationship to Child)

What is your financial obligation?

Advisors:

Legal

Name _____ Phone _____

Address _____

Taxes

Name _____ Phone _____

Address _____

Insurance

Name _____ Phone _____

Address _____

Investments

Name _____ Phone _____

Address _____

Bank

Name _____ Phone _____

Address _____

Other

Name _____ Phone _____

Address _____

Financial information:

Assets such as retirement plans, bank and portfolio accounts and life insurance policies can be left to a charitable beneficiary, like The Nat. It's important to keep those beneficiaries up to date, as those forms can take precedence over a Will or trust. It's also important to discuss this with your advisor or planner. You don't have to inform a charity that you have recognized them in your estate, but they do love to know so they can recognize you before your gift comes to fruition. It is very important to keep a copy of the information these companies have on your named beneficiaries since it can be difficult for the personal representative or trustee to obtain a copy of these beneficiary designation forms after you pass away.

I. Cash, Fixed Income Accounts, and CDs

Estimated Value	Owned By You	Owned by Spouse	Joint Owners
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total _____			

II. Securities

Estimated Value	Owned By You	Owned by Spouse	Joint Owners
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total _____			

**Did you know that gifts of appreciated stock or securities with a low-cost basis make excellent philanthropic gifts?*

III. Real Estate

Principal Residence

Address _____

Tax Assessment \$ _____

Ownership _____

Estimated Value \$ _____

Amount Indebted \$ _____

Other Real Estate Holdings

State _____

Tax Assessment \$ _____

Ownership _____

Estimated Value \$ _____

Indebtedness \$ _____

State _____

Tax Assessment \$ _____

Ownership _____

Estimated Value \$ _____

Indebtedness \$ _____

State _____

Tax Assessment \$ _____

Ownership _____

Estimated Value \$ _____

Indebtedness \$ _____

Promissory Notes Owed to You

Borrower _____

Payment Due Date _____

Loan Amount _____

Expiration Date _____

IV. Personal Property

Furnishings:

Item _____ Estimated Value \$ _____

Ownership _____ Beneficiary _____

Jewelry:

Item _____ Estimated Value \$ _____

Ownership _____ Beneficiary _____

Automobiles:

Item _____ Estimated Value \$ _____

Ownership _____ Beneficiary _____

Collectibles / Art:

Item _____ Estimated Value \$ _____

Ownership _____ Beneficiary _____

Other:

Item _____ Estimated Value \$ _____

Ownership _____ Beneficiary _____

V. Commercial Annuities

Estimated Value	Owned By You	Owned by Spouse	Joint Owner	Beneficiary
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Total _____				

VI. Retirement Assets

Estimated Value	Owned By You	Owned by Spouse	Joint Owner	Beneficiary
IRA \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pension \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Profit-Share \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
401 (k) \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
403 (b) \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Total _____				

**Did you know that IRAs and assets set aside pre-tax make excellent philanthropic gifts?*

VII. Life Insurance

Est. Value	Policy Type	Policy Owner	Policy #	Insured Name	Beneficiary
\$ _____	_____	_____	_____	_____	_____
\$ _____	_____	_____	_____	_____	_____
\$ _____	_____	_____	_____	_____	_____
Total _____					

VIII. Business Interests

Estimated Value	Owned By You	Owned by Spouse	Joint Owner	Beneficiary
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Value \$ _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Total _____				

Any loans? If so, list indebtedness: _____

Additional Assets

Asset	Estimated Value	Owned By	Beneficiary
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

Indebtedness Description

Please list any liabilities that are not already listed under the Asset Description section; attach a separate listing if more room is needed.

Summary of Financial Information

Total Assets	Owned By You	Owned By Spouse	Owned Jointly
Cash, Fixed income, CDs	_____	_____	_____
Real Estate	_____	_____	_____
Securities	_____	_____	_____
Personal Property	_____	_____	_____
Commercial Annuities	_____	_____	_____
Retirement Assets	_____	_____	_____
Life Insurance	_____	_____	_____
Business Interest	_____	_____	_____
Total Assets	_____	_____	_____

Do you have a safety deposit?

Contents	Estimated Value	Owned By	Location (box/key)
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

Additional Notes:

Total Liability

Total Liabilities	Owned By You	Owned By Spouse	Owned Jointly
Cash, Fixed income, CDs	_____	_____	_____
Auto Loans	_____	_____	_____
Personal Loans	_____	_____	_____
Mortgages	_____	_____	_____
Business Loans	_____	_____	_____
Pledges	_____	_____	_____
Total Liabilities	_____	_____	_____
Life Insurance	_____	_____	_____
Other	_____	_____	_____
Total Indebtedness	_____	_____	_____
Total Net Worth	_____	_____	_____

Inheritance

Please describe any anticipated inheritances or gifts.

Inheritance

Please list annual income from all sources.

You	Spouse	Joint
\$ _____	\$ _____	\$ _____

Important documents to gather

- Records of your present marriage and prenuptial agreements, if any
- Records of death or divorces of former spouses and a copy of any settlement documents
- Copy of present Will and/or revocable trust and codicils or amendments
- Military discharge papers
- Stock certificates
- Bonds
- Promissory Notes owed to you

Planned Care of Family

Who will make healthcare decisions for you if you are not able to make them yourself?

Name _____ Phone _____

Relationship _____

Address _____

Who will make healthcare decisions for your spouse if they are not able to do so themselves?

Name _____ Phone _____

Relationship _____

Address _____

Describe any health problems or special needs of you or your family members:

If you have minor children, do you want their share of your estate to be distributed outright when they attain the age of majority (age 18), or retained in a trust to be administered for their benefit until a specified age?

Other important information

Digital Access

List all digital accounts with login information for your next of kin to handle digital bills, social media accounts, and other important digital assets.

Account name	Username	Password	URL
_____	_____	_____	_____
Account name	Username	Password	URL
_____	_____	_____	_____
Account name	Username	Password	URL
_____	_____	_____	_____

Do you own 529 Plans for your children?

Where are other important items and documents kept in your home?

Additional Notes:

Step 2: Consult with a professional

While it is possible to write your own Will or revocable trust, it is preferable to seek legal counsel. Your attorney can ensure that your Will or trust legally provides for your beneficiaries in the manner you direct. He or she can advise on ways to save money and reduce taxes; advise you regarding powers of attorney, medical proxies, living Wills and other estate planning matters; and even help with important tax and estate laws that may affect the distribution of your estate.

The best way to find an attorney to help with your planning is through personal referrals. Ask someone you trust for a recommendation. If you have an accountant, broker, or other professional advisor working with you, ask for their recommendations as well. You may also inquire at your local bank's trust department, since trust officers frequently work with estate planners.

List of Potential Attorneys:

Name _____ Address _____

Phone _____

Need help? The Nat can recommend some of our favorite attorneys!

Remember, we at The Nat are a group of scientists, geeks, and nature enthusiasts, not lawyers. While we can direct you towards some great resources, we cannot give you legal advice. That's what the experts are for. Please always consult an estate planning professional when it comes to your future planning.

Step 3: Decide how to distribute your assets

Specify who receives tangible personal property such as jewelry and automobiles. Detail what happens to your residence(s) or other real estate. Leave specific assets or cash to family members, friends, or charitable organizations you care about, such as The San Diego Natural History Museum. Use various forms of trusts to provide for the care of minors or infirm adults, contribute to a charitable organization, or reduce or eliminate estate and inheritance taxes. Always discuss gifts of non-cash assets with charitable organizations ahead of time.

Beneficiaries

(Friends, family, etc.)

Name

What you wish to give

(Charitable beneficiaries)

Organization Name

What you wish to give

Organization Name

What you wish to give

Step 4: Select a Representative or Trustee

It's important to name a personal representative or trustee—someone who will be responsible for seeing that the provisions you included in your Will or trust are carried out. Your personal representative needs to be an ethical person who has the time necessary, and preferably, is experienced in business-related or investment related matters. A representative can be an individual, a bank with trust powers, or a trust company. Your trustee should not be The Nat or any charity benefitting from your estate (due to conflict of interest issues, lack of capacity for the charity, etc.). Having your estate in good order will reduce the burden for your trustee and ultimately estate expenses.

Trustee

Name _____ Address _____

Phone _____

Successor Trustee

Name _____ Address _____

Phone _____

Step 5: Review your plan periodically

There are many reasons to review your plan periodically, including life changes, changes in tax laws, or moving to a new state where new laws may apply. Or, you may decide to make additional charitable contributions. Any of these situations may call for updates to your Will or trust. Creating an estate plan can seem overwhelming, but having a plan in place can bring you and those you care about peace of mind as you determine your legacy and make the future easier for the people and causes you care about.

If you have any questions about how to include The Nat in your estate planning, or you would like to let us know that you have already included us, please reach out to our Vice President of Philanthropy and Engagement and Live Oaks Society member, Eowyn Bates, at 619.255.0172 or ebates@sdnhm.org.

This is a free guide to help you plan. **You should not return or share this with The San Diego Natural History Museum.** You can learn more about Legacy Giving with The Nat at sdnat.org/liveoaks.

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