

Beginning Planning Worksheet

Legal and Financial Concerns

Areas of Focus	Information to Gather
Sources of Income	<ul style="list-style-type: none"> ○ Social Security ○ Pension ○ Annuities ○ Retirement Accounts ○
Additional Assets	<ul style="list-style-type: none"> ○ Investments ○ Stocks, Bonds, Mutual Funds ○ Savings ○
Location of finances and documents	<ul style="list-style-type: none"> ○ Bank Accounts ○ Safe Deposit Boxes ○ Insurance policies ○ Discharge papers ○ Will ○
Expenses	<ul style="list-style-type: none"> ○ Ongoing bills (Utilities, phone, food, etc.) ○ Credit cards ○ Mortgages, loans ○ Rent ○ Condo/maintenance fees ○ Insurances ○ Home health, homemaker, respite ○

Important Contacts

Attorney:

Accountant:

Financial Planner:

Insurance Agents:

Personal Representatives:

Powers of Attorney

Health Care Power of Attorney:

Health Care Agent: _____

Alternate: _____

The following have copies:

1. _____
2. _____
3. _____
4. _____

Financial Power of Attorney:

Financial Agent: _____

Alternate: _____

The following have copies:

1. _____
2. _____

Living Will and Advance Directive complete dated: _____

For copies of the Maine Health Care Advance Directives forms, go to http://www.mainelse.org/library/adv_dir_forms.htm or contact SMAA at 1-800-427-7411.