DeVetter Law

FREE CHECKLIST FOR GEORGIA FAMILIES

Your Estate Planning Prep Kit

A simple, step-by-step checklist to gather your information, think through the big decisions, and walk into your first conversation with us feeling ready.

- ✓ Fill in what you know
- ✓ Skip what you don't

PROTECT WHAT YOU'VE BUILT.

Honor what you'll leave. A companion to our free guide, *Empower Your Legacy in Georgia.*

START HERE

How we'll build your plan together

You're the author of this story. We're your guide. Every plan we create follows the same four phases, and this kit prepares you for **Phase 1**, where your answers shape everything that follows.

1

Getting Started

A free conversation with our team about your family, your goals, and what's on your mind.

YOU ARE HERE

2

Designing Your Plan

You complete a short questionnaire, then meet with us to design the plan that fits your family.

3

Drafting & Review

We prepare your documents and review them with you until they feel right.

4

Signing & Beyond

You sign, we finalize everything, and we stay with you as life changes.

How to use this kit

1. Work through Sections 1 through 6 at your own pace. If you're planning with a spouse or partner, do it together.
2. Write down what you know. If you're still deciding, check "Not sure yet." That's a great thing to talk through with us.
3. Gather the documents in Section 6. Copies are fine.
4. Keep this kit next to you during your first call. We'll follow the same order, so nothing gets missed.
5. Want to save time? Email us a photo or scan of your completed pages before we talk.

Short on time?

If you can only answer five things before your call, make it these. They tell us almost everything we need to recommend the right kind of plan.

1	Who's in your family, including children's ages	Sec. 2
2	Whether you own a home	Sec. 4
3	Who you'd trust to be in charge	Sec. 3
4	Any special family situations	Sec. 2
5	Any existing will, trust, or power of attorney	Sec. 1

SECTION 1

PHASE 1 · GETTING STARTED

ABOUT YOU

WHY WE ASK Your county, your marital status, and any documents you already have help us understand where you're starting from, and what needs to change.

YOU

Full legal name

Date of birth

Best phone number

Email

Best time to reach you

Home address

County

SPOUSE OR PARTNER

if you're planning together

Full legal name

Date of birth

Your status

◯ Married ◯ Partnered, not married ◯ Single ◯ Divorced ◯ Widowed

WHAT YOU ALREADY HAVE

check any you've signed before, and the year if you know it

Existing documents

☐ Will ____ ☐ Trust ____ ☐ Power of attorney ____ ☐ Healthcare directive ____ ☐ None

Were any of these signed in a state other than Georgia? ◯ Yes ◯ No ◯ Not sure

WHAT BRINGS YOU TO US NOW?

check all that apply

☐ Marriage or new partner ☐ New baby or grandchild ☐ Bought a home ☐ Divorce ☐ Retirement

☐ Started or sold a business ☐ Loss in the family ☐ Health change ☐ Updating an old plan

☐ Just peace of mind

SECTION 2

PHASE 1 · GETTING STARTED

Your family

WHY WE ASK Your family's shape decides your plan's shape. Young children, blended families, or a loved one with special needs don't make planning harder. They just mean we design it with more care.

CHILDREN

include children from all relationships, adopted children, and stepchildren

NAME	AGE	RELATIONSHIP	NOTES
		☐ Ours ☐ Mine ☐ Step	
		☐ Ours ☐ Mine ☐ Step	
		☐ Ours ☐ Mine ☐ Step	
		☐ Ours ☐ Mine ☐ Step	
		☐ Ours ☐ Mine ☐ Step	
		☐ Ours ☐ Mine ☐ Step	

Grandchildren (names or number)

Others who depend on you (a parent, a sibling)

SPECIAL SITUATIONS

check any that apply; we'll talk through each one

☐ Children under 18 ☐ Blended family ☐ A loved one with special needs

☐ Someone who struggles with money ☐ An estranged family member ☐ Family living outside Georgia

☐ Property in another state ☐ Own a business

Anything else about your family we should know?

! **Have children under 18?** Without a will that names a guardian, a court decides who raises your children, without hearing from you. Naming a guardian is one of the most important things a plan can do.

SECTION 3

PHASE 1 · GETTING STARTED

Your trusted people

WHY WE ASK A plan is only as strong as the people you put in charge. Choose a first choice and a backup for each role, and if you can, ask them before your plan is signed.

ROLE	FIRST CHOICE	BACKUP	HAVE YOU ASKED THEM?
Executor Settles your affairs and carries out your will			☐ Yes ☐ Not yet
Guardian Raises your minor children if you can't			☐ Yes ☐ Not yet
Trustee Manages a trust, if your plan includes one			☐ Yes ☐ Not yet
Financial agent Handles money matters if you're unable to (power of attorney)			☐ Yes ☐ Not yet
Healthcare agent Makes medical decisions if you can't speak for yourself			☐ Yes ☐ Not yet

Play to their strengths

The same person can fill several roles, but they don't have to. You might choose a child who's a nurse as your healthcare agent and a different child with a head for numbers as your financial agent.

Good questions to ask yourself

- Do they live nearby, or could they manage from a distance?
- Are they organized and good with paperwork?
- Would they stay calm and fair under pressure?
- Do they share your values about money and family?

Still deciding on someone? That's completely normal.

☐ I'd like help thinking this through

NOTES ON MY CHOICES anyone you would *not* want in a role, and why

SECTION 4

PHASE 1 · GETTING STARTED

What you own & owe

WHY WE ASK A rough picture of what you own, and how it's titled, helps us recommend whether a will, a trust, or a combination is right for you. Ballpark numbers are plenty.

YOUR SNAPSHOT

check what applies

TYPE	DO YOU HAVE THIS?	APPROX. VALUE	BENEFICIARY NAMED?	NOTES
Home or other real estate	☐ Yes ☐ No		n/a	
Bank accounts	☐ Yes ☐ No		☐ Yes ☐ No ☐ ?	
Investment accounts	☐ Yes ☐ No		☐ Yes ☐ No ☐ ?	
Retirement accounts (401k, IRA)	☐ Yes ☐ No		☐ Yes ☐ No ☐ ?	
Life insurance	☐ Yes ☐ No		☐ Yes ☐ No ☐ ?	
Business interests	☐ Yes ☐ No		n/a	
Vehicles	☐ Yes ☐ No		n/a	
Valuables (jewelry, art, collections)	☐ Yes ☐ No		n/a	

Major debts (check all that apply) ☐ Mortgage ☐ Student loans ☐ Business loans ☐ Other

BENEFICIARY CHECK-UP

something you can do today

Beneficiary forms on life insurance, retirement, and "payable on death" accounts **override your will**, so they need to match your plan. Pull them up and check:

☐ All are up to date ☐ An ex-spouse is still listed ☐ Someone who has passed is listed

☐ No backup beneficiary ☐ I'm not sure who's listed

YOUR DIGITAL LIFE

☐ Email ☐ Social media ☐ Online banking ☐ Cloud photos & files ☐ Cryptocurrency

☐ Password manager

Don't write passwords here. Just make sure someone you trust will know where to find them.

SECTION 5

PHASE 1 · GETTING STARTED

Your Wishes

WHY WE ASK This is the heart of your plan: who you want to provide for, and how you want to be cared for. There are no wrong answers, and nothing here is final until you sign.

WHO SHOULD INHERIT?

Primary beneficiaries (e.g., spouse, children)

If they pass before you, who receives their share?

Would you like to leave something to a charity, church, or school? ◯ Yes ◯ No ◯ Not sure yet

SPECIAL GIFTS

e.g., "Grandpa's watch to my son Michael" or "$5,000 to my alma mater"

ITEM OR AMOUNT	GOES TO

HEALTHCARE WISHES

a general sense is all you need right now

If you were seriously ill with little hope of recovery, which feels closest to your wishes?

- ◯ Every possible measure to extend my life
- ◯ Treatment, unless it only prolongs suffering
- ◯ Comfort care and pain relief only
- ◯ Not sure yet; I'd like to talk it through

Have you shared these wishes with your family or doctor? ◯ Yes ◯ Not yet

FINAL ARRANGEMENTS

Your preference ◯ Burial ◯ Cremation ◯ Other ◯ Undecided

Any wishes for your service, resting place, or memorial?

SECTION 6

PHASE 1 · GETTING STARTED

Documents to Gather

WHY WE ASK Having these on hand makes sure nothing gets overlooked, like an old life insurance policy or a forgotten account. Items marked START HERE matter most.

- [ ] **Any existing estate documents** START HERE
  Old wills, trusts, powers of attorney, or healthcare directives.
- [ ] **Deeds to your home or land** START HERE
  Or just the property address so we can look it up.
- [ ] **Beneficiary designations** START HERE
  For life insurance, retirement, and "payable on death" accounts.
- [ ] **Your family list** START HERE
  Section 2 of this kit covers it.
- [ ] **Recent account statements**
  Bank, investment, and retirement. The latest one for each is enough.
- [ ] **Life insurance policies**
  Including any through your employer.
- [ ] **Vehicle titles**
  Cars, boats, or other titled vehicles.
- [ ] **Business documents**
  Operating or partnership agreements, if you own a business.
- [ ] **Mortgage & loan statements**
  The latest statement for each.
- [ ] **Prenuptial or divorce papers**
  If they apply to you.
- [ ] **A list of digital accounts**
  No passwords needed. Just what exists.
- [ ] **Your photo ID**
  You'll need it on signing day.

Can't find something? Don't let it hold you up. Many families start planning with a few gaps, and we'll help you fill them along the way.

AFTER YOUR FIRST CALL

What happens next, and what we'll ask of you

Here's how the rest of the journey unfolds. We handle the legal work at every step. Your part is shown on the right.

PHASE 1 GETTING STARTED

Your first conversation

A free call with our team. We listen, answer your questions, and recommend the type of plan that fits.

YOUR PART
Have this kit nearby and share what's on your mind.

PHASE 2 DESIGNING YOUR PLAN

Your planning questionnaire

We send a secure online questionnaire that builds on what's in this kit.

YOUR PART
Complete it, ideally within about 10 days. This kit gives you a head start.

Your design meeting

You meet with our estate planning attorney to make the key decisions together. Afterward, you receive a written summary of your plan.

YOUR PART
Bring your questions. Include your spouse or partner if you're planning together.

Making it official

When you're ready to move forward, you sign an engagement agreement and we begin drafting.

YOUR PART
Review the summary and let us know you're ready.

PHASE 3 DRAFTING & REVIEW

We draft your documents

Your will, trust, powers of attorney, and healthcare directive, tailored to your design.

YOUR PART
Review the drafts and ask for any changes.

PHASE 4 SIGNING & BEYOND

Signing day

We guide you through signing with the required witnesses and notary, so everything is valid under Georgia law.

YOUR PART
Show up with your ID. We handle the rest.

Finalizing your plan

We organize your signed documents, help you take any remaining steps (like retitling property into a trust), and make sure you know where everything is.

YOUR PART
Complete any follow-up steps we send you.

Ongoing care

Life changes. When yours does (a marriage, a new grandchild, a move), we're here to keep your plan current.

YOUR PART
Let us know when big life events happen.

FOR YOUR CALL

My questions & notes

An informed client is an empowered client. Write down anything on your mind, big or small.

Questions other families often ask: Do I need a will or a trust? Should I include my stepchildren? What happens if a beneficiary is still a minor? How do I keep my home out of probate? Can I change my plan later?

QUESTIONS I WANT TO ASK

WHAT MATTERS MOST TO ME IN MY PLAN

NOTES FROM MY CALL

date: _____ spoke with: _____

READY WHEN YOU ARE

Your legacy matters. Let's protect it together.

Planning ahead is one of the most meaningful gifts you can give the people you love. Whether you filled in every line or just a few, you've already taken the first step. Bring this kit to your first conversation and we'll take it from there.

Send it ahead

Email a photo or scan of your completed pages before your call so we can review them in advance.

Or bring it along

Keep it in front of you during the call. We'll follow the same order, section by section.

Start Here | Your first conversation is free, with no obligation

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DeVetter Law

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