FREE WORKSHEET · THE FRAUD READY ESTATE PLAN

Trusted Contacts and Fiduciaries Worksheet

Name the people today who can protect you tomorrow. Keep this page with your estate planning binder.

Five safeguards make an estate plan fraud ready: a durable power of attorney, a living trust with incapacity terms, trusted contacts at every financial institution, a standing review every two to three years, and fiduciaries who are named and told today. This worksheet records parts three and five.

Part A. My decision makers

THE PEOPLE MY PLAN AUTHORIZES, AND ONE BACKUP FOR EACH

Role	First choice	Backup	They know? (Y/N)
Agent under my Durable Power of Attorney			
Successor trustee of my living trust			
Health care agent (Advance Health Care Directive)			
Emergency family contact for financial alarms			

Part B. My trusted contact filings

ONE ROW PER INSTITUTION. THE TRUSTED CONTACT GETS A PHONE CALL, NEVER ACCESS

Institution	Account type	Trusted contact named	Form filed on

Part C. What each fiduciary receives from me

CHECK EACH ITEM AS YOU HAND IT OVER

Item	Agent	Successor trustee	Health care agent
Where my original documents are kept			
My attorney's name and phone number			
The list of institutions where I hold accounts			
A short letter describing what I am asking of them			

Part D. My review rhythm

A STANDING REVIEW KEEPS EVERY NAME ABOVE CURRENT

My estate plan was last reviewed on:	
My next review is scheduled for:	
The person who will make sure it happens:	

Bring this worksheet to a free family protection review. We will look at what is in place, flag the gaps that matter most in California, and tell you honestly where you stand. (818) 788-7881, English, Spanish, and Russian.

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