The "I Wish I Had Done This Sooner" ESTATE PLANNING ORGANIZER

A Simple Family Guide to Getting Your Important Documents, Decisions & Wishes Organized Before You Need Them

Plan Today... for a Brighter Tomorrow

Prepared by

Dot The i

MOBILE NOTARY

Serving Savannah, Pooler, Richmond Hill, Port Wentworth, Rincon, The Landings, and surrounding areas.

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A Note Before You Begin

If you're holding this guide because you recently had a document notarized for yourself, a parent, spouse, child, or another loved one, there's a good chance something happened that made you realize how important preparation really is.

Maybe someone became ill.

Maybe a family member was admitted to the hospital.

Maybe someone moved into assisted living.

Maybe you needed a Power of Attorney.

Maybe you suddenly needed to know who could make medical decisions.

Or maybe you simply realized:

“We should have done this sooner.”

You're not alone.

Many families don't think about estate planning until there is a crisis.

And that's understandable.

Life is busy. Important conversations get postponed. Documents sit on a to-do list. People assume they'll have plenty of time.

But estate planning isn't really about expecting something bad to happen.

It's about making things easier for the people you love if life doesn't go according to plan.

This workbook is designed to help you take that first step.

You don't have to complete everything today.

You don't have to know all the legal answers.

You don't have to have every document prepared.

Your job is simply to get organized, identify what is missing, and create a plan for the next step.

Start where you are.

Do what you can.

Put the rest on your calendar.

Because someday, you—or someone you love—may be very grateful that you did.

How to Use This Organizer

Don't try to complete this entire workbook in one sitting.

Instead, work through it in small pieces.

STEP 1 — Gather

Collect the information and documents you already have.

STEP 2 — Identify

Determine what's missing, outdated, difficult to find, or unclear.

STEP 3 — Discuss

Talk with the people who may need to help you or make decisions for you.

STEP 4 — Get Professional Advice

Take your questions to the appropriate professionals, such as an estate-planning attorney, financial professional, insurance professional, or tax professional.

STEP 5 — Organize

Keep important documents and information in a secure location and make sure the appropriate people know how to access them.

STEP 6 — Review

Life changes. Review your plan periodically and whenever you experience a major life event.

PART 1

Your Important Information

Start with the basics.

Having this information organized can make things much easier for your family if they ever need it.

Full Legal Name

Preferred Name

Date of Birth

Current Address

Primary Phone

Primary Email

Employer or Business

Important Family Members

Name	Relationship	Phone	Email

PART 2

Your Emergency Contact List

If something happened to you, who should be contacted first?

Primary Emergency Contact

Name: ___________________________________

Relationship: ____________________________

Phone: ___________________________________

Email: ___________________________________

Secondary Emergency Contact

Name: ___________________________________

Relationship: ____________________________

Phone: ___________________________________

Email: ___________________________________

Additional Important Contacts

Family Member

Friend

Attorney

Financial Professional

Insurance Professional

Physician / Healthcare Contact

PART 3

Your Healthcare Wishes

This section is designed to help you identify conversations you may need to have.

Consider:

- Who should be contacted during a medical emergency?
- Who do you want involved in healthcare decisions?
- Have you discussed your wishes with your family?
- Do you have an advance directive or other healthcare documents?
- Does someone you trust know where those documents are located?

Questions I Need to Discuss

1.

2.

3.

4.

Important People I Need to Talk To

PART 4

Power of Attorney Checklist

A Power of Attorney can be an important part of planning, but the type of authority someone needs depends on the person's circumstances.

Use this section to identify questions—not to determine your own legal needs.

Do I currently have a Power of Attorney?

☐ Yes

☐ No

☐ I'm not sure

When was it created?

Where is the original located?

Who knows where it is?

Does my family know who I have designated?

☐ Yes

☐ No

☐ Need to discuss

Questions for an Attorney

PART 5

Will & Estate Planning Checklist

Do I currently have a Will?

☐ Yes

☐ No

☐ I'm not sure

When was it last reviewed?

Where is it located?

Does my family know where it is?

☐ Yes

☐ No

Have there been major changes since it was created?

☐ Marriage

☐ Divorce

☐ Birth of a child

☐ Death in the family

☐ New property

☐ Major financial changes

☐ Business ownership changes

☐ Move to another state

☐ Other: ________________________________

Questions I Need to Ask an Estate-Planning Attorney

PART 6

Medical & Healthcare Documents

Use this checklist to identify documents you may already have.

☐ Advance directive / healthcare directive

☐ Healthcare Power of Attorney

☐ Living Will or other healthcare wishes document

☐ HIPAA-related authorization or instructions

☐ Organ donation information

☐ Other healthcare documents

Where are my healthcare documents?

Who knows where they are?

Have I discussed my wishes with my family?

☐ Yes

☐ No

☐ Need to do this

PART 7

Financial Information

You don't need to write account numbers or passwords in this workbook.

Instead, identify what exists and where the important information can be found.

Banking

☐ Checking account

☐ Savings account

☐ Certificate of deposit

☐ Safe deposit box

Investments

☐ Brokerage account

☐ Retirement account

☐ Pension

☐ Other investments

Insurance

☐ Life insurance

☐ Health insurance

☐ Long-term care insurance

☐ Homeowners/renters insurance

☐ Auto insurance

Real Estate

☐ Primary residence

☐ Rental property

☐ Vacation property

☐ Other real estate

Business Interests

☐ Business ownership

☐ Partnership interest

☐ Corporation/LLC interest

☐ Intellectual property

☐ Other

Where can my family find information about these assets?

PART 8

Your Property & Possessions

Make a list of property or possessions that may be important to you or your family.

Think beyond the obvious.

Real Estate

Vehicles

Jewelry

Family Heirlooms

Collectibles

Other Valuable Property

Are there items with special sentimental value?

PART 9

Digital Life

Your digital life is part of your life too.

Make a list of important digital services and accounts without putting passwords in this workbook.

Email

☐ Personal email

☐ Work email

☐ Other

Financial

☐ Online banking

☐ Investment accounts

☐ Payment services

Social Media

☐ Facebook

☐ Instagram

☐ Other

Subscriptions

☐ Streaming

☐ Memberships

☐ Other

Digital Assets

☐ Digital photographs

☐ Important files

☐ Websites/domains

☐ Cryptocurrency

☐ Other digital assets

Where can authorized people find instructions for accessing these accounts?

PART 10

Important Documents

Use this checklist to determine which documents you have and where they are located.

Document	Have It?	Location	Last Reviewed
Will	☐		
Power of Attorney	☐		
Healthcare Documents	☐		
Trust Documents	☐		
Life Insurance	☐		
Property Records	☐		
Business Documents	☐		
Tax Records	☐		
Other	☐		

PART 11

The "If Something Happened to Me Tomorrow" Test

This is one of the most important pages in this workbook.

Imagine that tomorrow you couldn't communicate with your family.

Ask yourself:

Would they know who to call?

☐ Yes

☐ No

Would they know where my important documents are?

☐ Yes

☐ No

Would they know who I want to make important decisions?

☐ Yes

☐ No

Would they know about my important financial institutions?

☐ Yes

☐ No

Would they know about my insurance?

☐ Yes

☐ No

Would they know what I want regarding my healthcare?

☐ Yes

☐ No

Would they know who my attorney is?

☐ Yes

☐ No

Would they know where my Will is?

☐ Yes

☐ No

Would they know where my Power of Attorney is?

☐ Yes

☐ No

Your Results

If you checked mostly YES:

Great! You're already taking important steps toward being organized.

If you checked several NOs:

That's not a failure. It's your opportunity.

Every "No" is simply an item that can move onto your planning list.

You don't have to fix everything today.

You just need to start.

____

____

____

____

PART 12

Your Estate Planning To-Do List

Now turn everything you've discovered into an action plan.

My Top 5 Priorities

1. ____________________________________

2. ____________________________________

3. ____________________________________

4. ______________________________________

5. ______________________________________

My 30-Day Estate Planning Challenge

WEEK 1 — GET ORGANIZED

☐ Gather existing documents

☐ Identify missing information

☐ Locate your important documents

☐ Make your emergency contact list

WEEK 2 — HAVE THE CONVERSATIONS

☐ Talk with your spouse/partner

☐ Talk with your children/family

☐ Discuss healthcare wishes

☐ Discuss who should be contacted during an emergency

WEEK 3 — GET PROFESSIONAL HELP

☐ Find an estate-planning attorney if needed

☐ Prepare questions for your attorney

☐ Review insurance needs with the appropriate professional

☐ Review financial planning needs with the appropriate professional

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WEEK 4 — FINISH & ORGANIZE

☐ Complete missing documents

☐ Review existing documents

☐ Organize important records

☐ Tell appropriate people where documents are located

☐ Put a future review date on your calendar

PART 13

My "People Who Need to Know" List

One of the most overlooked parts of estate planning isn't creating documents.

It's making sure the right people know that the documents exist.

Person #1

Name: ______________________________________

What they need to know:

____

____

____

____

____

Person #2

Name: ______________________________________

What they need to know:

Person #3

Name: ___________________________________

What they need to know:

PART 14

Questions for My Estate-Planning Attorney

Take this page with you to your appointment.

Questions about my Will

Questions about Power of Attorney

Questions about healthcare planning

Questions about trusts

Questions about my family

Other questions

PART 15

My Estate Planning Appointment

Attorney / Professional

Appointment Date

Questions I Want Answered

Documents I Need to Bring

Follow-Up Items

Don't Wait Until Your Family Has to Say...

"I Wish We Had Done This Sooner."

Estate planning isn't about predicting the future.

It's about preparing for it.

You may never need some of the documents or information you've organized. But if the day comes when your family needs them, having them prepared can make an incredibly difficult situation easier to navigate.

Start with one thing.

Find one document.

Have one conversation.

Make one appointment.

Complete one task.

Then do the next.

The goal isn't perfection.

The goal is preparation.

Your Next Step

If you discovered that you have questions about your documents or estate-planning needs, don't guess.

Write down your questions and speak with the appropriate qualified professional.

An estate-planning attorney can help you understand your legal options and determine which documents may be appropriate for your circumstances.

When your documents are ready and you need an authorized notarial act, Dot The i Mobile Notary will come to you.

DOT THE i MOBILE NOTARY

Professional Mobile Notary Services

Serving Savannah, Pooler, Richmond Hill, Port Wentworth, Rincon, Tybee Island, The Landings, and surrounding areas.

912-272-0922

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Need a Notary?

BOOK YOUR APPOINTMENT

IMPORTANT DISCLAIMER

This workbook is provided for general educational and organizational purposes only. It is not legal, financial, tax, medical, or other professional advice and does not create an attorney-client relationship or other professional relationship.

Dot The i Mobile Notary does not determine which estate-planning documents you need, prepare legal documents, explain the legal consequences of signing documents, or provide legal advice.

Estate-planning laws and individual circumstances vary. For advice about your specific situation, consult a qualified estate-planning attorney or other appropriate professional.

Notarization does not by itself make a document legally valid or appropriate for your circumstances.

Use this workbook as an organizational tool to help you identify questions, gather information, and prepare for conversations with qualified professionals.