

A conversation starter — not a legal document. Fill it out together at the kitchen table.

- 1 The Big Questions**
- 2 The Stuff List**
- 3 Our Wishes**
- 4 What's Next**

≈ 45 min · schwartzmanlawgroup.com

- ☐ **If something happened to both of us, who should raise the kids? Write your top 2 choices.**

- ☐ **Who should make medical decisions for each of us if we can't?**

- ☐ **Who should be in charge of money and paperwork (executor)? A backup?**

- ☐ **Do we own anything someone might fight over? List it.**

- ☐ **Does anyone in our family need special financial protection? Who and why?**

- ☐ **Where are our important documents right now? Could someone find them?**

Not a formal schedule — just get it all in one place. Most couples have never done this.

Home / real estate (address, owned how?)

Bank accounts (bank + type)

Retirement accounts (401(k), IRA, pension)

Life insurance (company + who's the beneficiary?)

Business interests

Debts (mortgage, loans, cards)

Valuables (jewelry, art, collections)

Digital (passwords manager? crypto? domains?)

Non-legal preferences. This is the page that makes it real.

Funeral / memorial wishes

Family heirlooms — who should get what

Charitable intentions

Messages we want loved ones to know

Now you know what you need. Here's how to make it official:

- 1 Take your free Estate Clarity Score at schwartzmanlawgroup.com/estate-clarity/
- 2 Gather the documents you already have (will, POA, deeds, policies)
- 3 Book a free consultation: +1 212 518 3868 • ms@schwartzmanlaw.com
- 4 Tell one trusted person where this kit and your documents live

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