PERSONAL RECORDS & PLANNING GUIDE

Estate Planning Organizer

Peace of mind, organized.

One place for the people, accounts, documents and wishes your family would need, plus a step-by-step guide to working with an estate attorney and tax advisor on a California revocable living trust.



- ◇ 29 fill-in sections, on screen or by hand
- ◇ A seven-step trust and tax advisor walkthrough
- ◇ Checklists, plain-English notes and official sources



PART 1
About you



PART 2
Money & property



PART 3
Everyday life



PART 4
Legal & wishes



PART 5
Trust & tax guide

PREPARED FOR	DATE STARTED	LAST REVIEWED



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KELLERWILLIAMS. REALTY

Once filled in, this organizer holds private information. Store it securely: see **How to use**. This is not legal or tax advice; see **Sources & disclaimer**.

START HERE

How to use this organizer

Work through it in short sessions. You don't need to finish it all at once, and blank sections are fine if they don't apply to you.



Fill it in your way

- **On screen:** open it in free Adobe Acrobat Reader or another PDF app that supports forms, type in the fields, then save a copy with a new name.
- **By hand:** print it single-sided on letter paper at 100% ("actual size"). Use pen for facts and pencil for things that change.
- **One household:** where you see "You" and "Spouse / partner" columns, a couple can share one copy.

Five habits that keep it safe

1. **Write where things are, not the secrets themselves.** Note the bank and the last 4 digits, not the full account number.
2. **Never write passwords, PINs, security answers or crypto recovery phrases** anywhere in this organizer.
3. **Skip full Social Security numbers.** Record where the card is kept instead.
4. **Tell one or two trusted people** that this organizer exists and where to find it.
5. **Review it once a year** and after big life events. A review log is on the **Review page**.

Where to store it safely

FIRE-RESISTANT HOME SAFE
Good for the printed organizer and copies. Make sure a trusted person can get to it.

WITH YOUR ATTORNEY
Many estate attorneys keep originals or copies of signed documents. Note what they hold on the **Originals page**.

ENCRYPTED DIGITAL COPY
If you fill it in on screen, protect the file with a strong password, keep it in an encrypted location, and don't send it by regular email.

SAFE DEPOSIT BOX, WITH CARE
Fine for originals like deeds. Ask your bank who can open the box if you can't, and keep your health care directive somewhere your family can reach right away.

WHERE THIS ORGANIZER LIVES

LOCATION OF THIS ORGANIZER

DIGITAL COPY LOCATION (IF ANY)

TRUSTED PERSON WHO KNOWS #1

TRUSTED PERSON WHO KNOWS #2

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PART 1 · ABOUT YOU

Personal information

The basics your family, attorney and advisors will ask for first. Record where documents are kept, never full ID numbers.

ITEM	YOU	SPOUSE / PARTNER
Full legal name		
Other names used (maiden, former)		
Date of birth		
Place of birth (city, state, country)		
Citizenship		
Social Security card: where kept		
Driver's license or ID: state, last 4, where kept		
Passport: last 4, expires, where kept		
Home address		
Mobile phone		
Email		
Employer or occupation		
Military service: branch and dates		
Discharge papers (DD-214): where kept		
Medicare or health plan card: where kept		

Marriage or partnership

☐ Single ☐ Married ☐ Registered domestic partners ☐ Divorced ☐ Widowed ☐ Separated

DATE AND PLACE OF MARRIAGE OR REGISTRATION

CERTIFICATE: WHERE KEPT

PRIOR MARRIAGES: NAME AND HOW ENDED

DIVORCE DECREE OR SETTLEMENT: WHERE KEPT

PRENUPTIAL OR POSTNUPTIAL AGREEMENT: WHERE KEPT

PART 1 · ABOUT YOU

Family & dependents

Everyone who depends on you, and anything a caregiver would need to know right away.



CHILD OR DEPENDENT 1

FULL NAME

RELATIONSHIP | DATE OF BIRTH

MOBILE PHONE | EMAIL

ADDRESS

NOTES: SCHOOL, CARE NEEDS, OTHER PARENT

CHILD OR DEPENDENT 2

FULL NAME

RELATIONSHIP | DATE OF BIRTH

MOBILE PHONE | EMAIL

ADDRESS

NOTES: SCHOOL, CARE NEEDS, OTHER PARENT

CHILD OR DEPENDENT 3

FULL NAME

RELATIONSHIP | DATE OF BIRTH

MOBILE PHONE | EMAIL

ADDRESS

NOTES: SCHOOL, CARE NEEDS, OTHER PARENT

CHILD OR DEPENDENT 4

FULL NAME

RELATIONSHIP | DATE OF BIRTH

MOBILE PHONE | EMAIL

ADDRESS

NOTES: SCHOOL, CARE NEEDS, OTHER PARENT

Others who rely on you

Parents, relatives or friends you support financially or care for.

NAME	RELATIONSHIP	PHONE	WHAT SUPPORT YOU PROVIDE

PART 1 · ABOUT YOU

Extended family

Parents, siblings, grandchildren and other relatives your family may need to reach.

NAME	RELATIONSHIP	MOBILE PHONE	EMAIL	CITY, STATE

Grandchildren

NAME	PARENT	DATE OF BIRTH	PHONE OR EMAIL



PART 1 · ABOUT YOU

Emergency contacts

Who should be called first if you are hospitalized or can't speak for yourself, and the household details they'll need.

NAME	RELATIONSHIP	MOBILE	OTHER PHONE	HOW THEY CAN HELP

Around the house

WHO HAS A SPARE HOUSE KEY

WHO KNOWS THE ALARM CODE (NOT THE CODE)

NEIGHBOR TO CALL

SPARE CAR KEYS: WHERE KEPT

WATER SHUTOFF LOCATION

GAS SHUTOFF LOCATION

ELECTRICAL PANEL LOCATION

HOME WARRANTY COMPANY AND PHONE

Work & daily life

EMPLOYER HR OR BENEFITS CONTACT

PHONE

CHILDCARE, SCHOOL OR CAREGIVER CONTACT

FAITH COMMUNITY OR CLUB CONTACT

WHO CAN PICK UP MAIL AND PACKAGES

> Keep alarm codes, garage codes and safe combinations out of this organizer. Write the **name of the person who knows** them.



PART 1 · ABOUT YOU

Key advisors

The professionals your family should call. Note what each one handles, and any originals they keep.

ESTATE PLANNING ATTORNEY

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

CPA OR TAX ADVISOR

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

FINANCIAL ADVISOR

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

INSURANCE AGENT

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

BANKER OR TRUST OFFICER

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

EXECUTOR OR SUCCESSOR TRUSTEE

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

EMPLOYER BENEFITS CONTACT

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

REAL ESTATE ADVISOR

NAME _____ FIRM _____

PHONE _____ EMAIL _____

WHAT THEY HANDLE OR HOLD _____

Need a referral? We can share names of Bay Area estate attorneys and CPAs our clients have worked with. You choose, and always confirm licenses yourself (see the **attorney** and **CPA** steps).

PART 1 · ABOUT YOU

Doctors & health information

The care team and health details someone would need if they had to step in for you.



ROLE	FOR (WHOM)	DOCTOR OR PROVIDER	PRACTICE OR HOSPITAL	PHONE
Primary care				
Specialist				
Specialist				
Specialist				
Dentist				
Eye doctor				
Mental health				
Home care or therapy				
Other				

Health details

ITEM	YOU	SPOUSE / PARTNER
Health plan or Medicare plan		
Supplement, Advantage or Part D plan		
Preferred hospital		
Pharmacy and phone		
Medication list: where kept		
Allergies		
Ongoing conditions		
Implants or medical devices		
Vision, dental or hearing plans		
Blood type (optional)		



PART 1 · ABOUT YOU

Medical directives & health care proxy

In California, an Advance Health Care Directive lets you name a health care agent (your proxy) and write down your treatment wishes.

YOU

☐ Have an advance directive ☐ In progress ☐ Not yet

DATE SIGNED

ORIGINAL KEPT AT

HEALTH CARE AGENT

AGENT PHONE

ALTERNATE AGENT

ALTERNATE PHONE

COPIES GIVEN TO

ALSO IN PLACE

☐ HIPAA authorization ☐ POLST (with doctor)
☐ DNR order ☐ Registered with CA Secretary of State
☐ Organ donor registration

SPOUSE / PARTNER

☐ Have an advance directive ☐ In progress ☐ Not yet

DATE SIGNED

ORIGINAL KEPT AT

HEALTH CARE AGENT

AGENT PHONE

ALTERNATE AGENT

ALTERNATE PHONE

COPIES GIVEN TO

ALSO IN PLACE

☐ HIPAA authorization ☐ POLST (with doctor)
☐ DNR order ☐ Registered with CA Secretary of State
☐ Organ donor registration

VALUES AND WISHES I WANT MY HEALTH CARE AGENT TO KNOW

GOOD TO KNOW

- The California Attorney General posts a statutory directive form. It must be signed before two qualified witnesses or a notary.
- You can file your directive with the Secretary of State's Advance Health Care Directive Registry.
- A POLST is a medical order signed with your doctor, usually for serious illness.

Sources 6 and 7 on the **Sources page**.

Care preferences later in life

IF I CAN NO LONGER LIVE ON MY OWN, I WOULD PREFER

☐ At home with help ☐ With family ☐ Assisted living ☐ Memory care if needed ☐ Skilled nursing ☐ No preference

COMMUNITIES OR CARE PROVIDERS I'D CONSIDER

HOW I'D PAY: LONG-TERM CARE INSURANCE, SAVINGS OR HOME SALE

WHO SHOULD HELP ME DECIDE

THINGS THAT MATTER MOST TO ME DAY TO DAY

In-Home Supportive Services can help eligible Californians stay at home. Source 34 on the **Sources page**.



PART 2 · MONEY & PROPERTY

Bank & cash accounts

Checking, savings, CDs, money market and credit union accounts.
Beneficiaries here are payable on death (POD). Record the last 4 digits only.

INSTITUTION	TYPE	OWNER(S) OR TITLE	LAST 4	PRIMARY BENEFICIARY (%)	CONTINGENT BENEFICIARY (%)	ONLINE ACCESS?	NOTES
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	

Other cash & payment accounts

PAYPAL, VENMO, ZELLE OR SIMILAR

FOREIGN ACCOUNTS

CASH KEPT AT HOME: WHERE

BANK STATEMENTS: PAPER OR ONLINE, WHERE KEPT

TITLING MATTERS

An account with a payable-on-death (POD) beneficiary, or one titled in your trust, can usually pass without probate. Joint accounts can pass to the surviving owner.

Before changing titles or beneficiaries, ask your attorney how each choice fits your plan.

Source 3 on the **Sources page**.

PART 2 · MONEY & PROPERTY

Investment accounts

Brokerage, trust, joint and education accounts, plus workplace equity that's common in the Bay Area. Beneficiaries here are transfer on death (TOD).



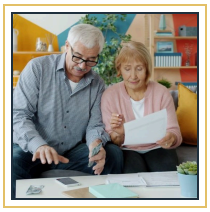
FIRM	ACCOUNT TYPE	OWNER OR TITLE	LAST 4	PRIMARY BENEFICIARY (%)	CONTINGENT BENEFICIARY (%)	ADVISOR OR CONTACT

Stock options, RSUs & ESPP

EMPLOYER	PLAN TYPE	WHERE VESTING DETAILS ARE	DEADLINES TO KNOW	CONTACT

Education savings (529 & others)

PLAN AND STATE	BENEFICIARY	OWNER	SUCCESSOR OWNER NAMED	LAST 4



PART 2 · MONEY & PROPERTY

Retirement accounts & HSA

401(k), 403(b), IRA, Roth IRA, pensions, annuities and health savings accounts. Beneficiary forms control these, not your will.

PLAN TYPE	INSTITUTION	OWNER	LAST 4	PRIMARY BENEFICIARY (%)	CONTINGENT BENEFICIARY (%)

Pensions & annuities

PENSION PLAN AND CONTACT

SURVIVOR BENEFIT OPTION CHOSEN

ANNUITY COMPANY AND CONTRACT LAST 4

REVIEW THESE FORMS

- Update beneficiaries after marriage, divorce, a birth or a death.
- Name a contingent beneficiary too.
- Ask your attorney and CPA before naming a trust as beneficiary of a retirement account; the tax rules are specific.
- HSA: a spouse beneficiary is treated differently from others. Ask your CPA.

Government benefits

BENEFIT	WHO RECEIVES IT	CLAIM OR FILE NUMBER: WHERE KEPT	OFFICE OR PHONE	LETTERS AND CARDS: WHERE KEPT
Social Security				
Medicare				
Medi-Cal				
VA benefits				
SSI, SSDI or other				

☐ my Social Security account set up at ssa.gov ☐ Veteran: DD-214 location noted on Personal page

Knowing where these letters are helps your family report changes and ask about survivor or burial benefits. Sources 28, 32 and 33 on the Sources page.

PART 2 · MONEY & PROPERTY

Real estate, mortgages & HOA

Your home is often the largest asset in an estate, and how it's titled decides whether it can avoid probate.



PROPERTY ADDRESS

TYPE: PRIMARY, RENTAL, VACATION, LAND

APN (PARCEL NUMBER)

DATE PURCHASED AND PRICE

HOW TITLE IS HELD

- [ ] Community property w/ right of survivorship
- [ ] Joint tenancy
- [ ] Tenants in common
- [ ] Sole owner
- [ ] Revocable trust
- [ ] Not sure: check the deed

NAME(S) ON TITLE

DEED: WHERE KEPT

Mortgage & HELOC

LENDER OR SERVICER

LOAN LAST 4

MONTHLY PAYMENT

PAID FROM (ACCOUNT)

HELOC OR SECOND LOAN: LENDER

SOLAR LEASE OR LOAN: COMPANY

- [ ] Autopay on
- [ ] Taxes and insurance in impound

HOA, taxes & insurance

HOA NAME

MANAGEMENT COMPANY AND PHONE

DUES AND FREQUENCY

HOA PORTAL: WHO HAS ACCESS

HOMEOWNERS INSURANCE AND LAST 4

EARTHQUAKE INSURANCE

Records & services for this home

CLOSING STATEMENT FROM PURCHASE: WHERE KEPT

IMPROVEMENT RECEIPTS AND PERMITS: WHERE KEPT

PROPERTY TAX: PAID BY IMPOUND OR DIRECTLY

UTILITIES: ACCOUNT HOLDER

HOME WARRANTY COMPANY

GARDENER, POOL, CLEANING OR OTHER SERVICES

> Thinking about selling, buying in a trust's name, or moving closer to family? See **Life transitions** for how we help, and **Step 6** for moving a home into a trust.

PART 2 · MONEY & PROPERTY

Other properties

Rentals, second homes, land, timeshares and property outside California.

PROPERTY 2

PROPERTY ADDRESS

TYPE: RENTAL, VACATION, LAND, OTHER

APN (PARCEL NUMBER)

DEED: WHERE KEPT

HOW TITLE IS HELD

☐ Community property w/ right of survivorship ☐ Joint tenancy ☐ Tenants in common ☐ Sole owner

☐ Revocable trust ☐ Not sure: check the deed

MORTGAGE LENDER AND LAST 4

PAYMENT AND PAID FROM

HOA AND MANAGEMENT COMPANY

INSURANCE COMPANY AND POLICY LAST 4

PROPERTY MANAGER AND PHONE

LEASES AND TENANT FILES: WHERE KEPT

PROPERTY 3

PROPERTY ADDRESS

TYPE: RENTAL, VACATION, LAND, OTHER

APN (PARCEL NUMBER)

DEED: WHERE KEPT

HOW TITLE IS HELD

☐ Community property w/ right of survivorship ☐ Joint tenancy ☐ Tenants in common ☐ Sole owner

☐ Revocable trust ☐ Not sure: check the deed

MORTGAGE LENDER AND LAST 4

PAYMENT AND PAID FROM

HOA AND MANAGEMENT COMPANY

INSURANCE COMPANY AND POLICY LAST 4

PROPERTY MANAGER AND PHONE

LEASES AND TENANT FILES: WHERE KEPT

TIMESHARES, LAND OR OUT-OF-STATE PROPERTY

Property in another state may need its own probate there. Ask your attorney if a trust should hold it.



PART 2 · MONEY & PROPERTY

Vehicles & other assets

Cars, boats and RVs, plus valuables and anything with sentimental worth that should go to someone specific.

YEAR, MAKE, MODEL	OWNER ON TITLE	VIN LAST 6	LENDER (IF ANY)	TITLE: WHERE KEPT	INSURER

Valuables & personal property

ITEM	DESCRIPTION	APPROX. VALUE	WHERE IT IS	INTENDED RECIPIENT

STORAGE UNIT: COMPANY, UNIT, KEY LOCATION

MONEY OWED TO YOU: WHO AND WHERE DOCUMENTED

CRYPTO & DIGITAL ASSETS

List the exchange or wallet type and who holds the access instructions. **Never write a seed or recovery phrase here.** Record it in the Digital accounts section.



PART 2 · MONEY & PROPERTY

Debts & liabilities

What you owe and how it's paid. Your executor or trustee will need this to settle the estate.

TYPE	LENDER	LAST 4	APPROX. BALANCE	PAYMENT	PAID FROM / AUTOPAY	CO-SIGNER OR INSURED?
Home mortgage						
HELOC						
Auto loan						
Student loan						
Credit card						
Credit card						
Credit card						
Credit card						
Personal loan						
Medical bills						
Owed to a person						
Loan I co-signed						

WHAT HAPPENS TO DEBTS

Debts are generally paid from the estate before anything is distributed. Family members usually aren't personally responsible unless they co-signed. Ask your attorney before anyone pays an estate debt from their own money.

CREDIT REPORT: LAST CHECKED

WHERE STATEMENTS ARE KEPT

CREDIT FREEZE IN PLACE WITH ALL THREE BUREAUS? (WHO CAN LIFT IT)

PART 2 · MONEY & PROPERTY

Insurance policies

Life, disability, long-term care, health and property coverage.
Note who owns each policy and who is the beneficiary.



TYPE	COMPANY	POLICY LAST 4	INSURED / OWNER	BENEFICIARY	COVERAGE	AGENT AND PHONE
Life (work)						
Life						
Life						
Disability						
Long-term care						
Health						
Homeowners						
Earthquake						
Auto						
Umbrella						
Other						

POLICIES AND DECLARATIONS PAGES: WHERE KEPT

PREMIUMS PAID FROM (ACCOUNT OR CARD)

EMPLOYER BENEFITS PORTAL: WHO TO CONTACT

IF A POLICY CAN'T BE FOUND

Beneficiaries can use the free NAIC Life Insurance Policy Locator to search for a deceased person's life insurance and annuities.

Source 20 on the **Sources page**.

PART 2 · MONEY & PROPERTY

Estate at a glance

A one-page summary of what you own and owe. Use round numbers, update it once a year, and keep the details on the pages listed.

VALUES AS OF (DATE) _____ PREPARED BY _____ NEXT REVIEW _____

WHAT YOU OWN	DETAILS	OWNER OR TITLE	IN TRUST OR HAS BENEFICIARY	APPROX. VALUE ($)
Primary home	p. 14		☐	
Other real estate	p. 15		☐	
Bank & cash	p. 11		☐	
Investment accounts	p. 12		☐	
Retirement & HSA	p. 13		☐	
Business interests	p. 22		☐	
Vehicles	p. 16		☐	
Valuables & personal property	p. 16		☐	
Life insurance (death benefit)	p. 18		☐	
Money owed to you	p. 16		☐	
Other	—		☐	
TOTAL ASSETS				

WHAT YOU OWE	APPROX. BALANCE ($)
Mortgages & HELOCs p. 14	
Auto & student loans p. 17	
Credit cards p. 17	
Other debts p. 17	
TOTAL LIABILITIES	

ESTIMATED NET WORTH

Total assets minus total liabilities

_____

California probate fees are figured on the **gross** value of assets that go through probate. Items in a trust or with a beneficiary usually don't count. See **Step 2**.

In Adobe Acrobat Reader the totals add up as you type. In other apps, add them by hand.



PART 3 · EVERYDAY LIFE

Digital accounts

Email, phones, photos, social media, shopping and financial apps. Your family needs a map, not your passwords.

NEVER WRITE PASSWORDS HERE

Do not record passwords, PINs, security answers, one-time codes or crypto recovery phrases anywhere in this organizer. Use a password manager and its emergency access feature, and note below only **which** manager you use and **who** can reach the access instructions.

Password manager

PASSWORD MANAGER USED

ACCOUNT EMAIL (NO PASSWORD)

EMERGENCY ACCESS CONTACT SET UP FOR

SEALED ACCESS INSTRUCTIONS: WHO HOLDS THEM

Devices & legacy settings

WHO CAN UNLOCK MY PHONE

WHO CAN UNLOCK MY COMPUTER

LEGACY CONTACTS SET UP

- ☐ Apple Legacy Contact
- ☐ Google Inactive Account Manager
- ☐ Facebook legacy contact ☐ Other

SERVICE OR SITE	USERNAME OR EMAIL (NO PASSWORD)	2-STEP DEVICE OR PHONE	WHAT SHOULD HAPPEN (KEEP, DOWNLOAD, CLOSE, MEMORIALIZE)

California law lets you decide who may access your digital assets after death (Probate Code §§ 870–884). Source 18 on the **Sources page**.

PART 3 · EVERYDAY LIFE

Bills, memberships & tax records

Utilities, phones, premiums and streaming, plus the programs and records someone will need to keep the lights on and close things down.



PAYEE	WHAT FOR	AMOUNT	DUE / HOW OFTEN	PAID FROM	AUTOPAY	CANCEL?
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐

California property tax is billed in two installments, due November 1 and February 1 and delinquent after December 10 and April 10. If taxes aren't paid through your mortgage, add them above.

Tax records

PAST TAX RETURNS: WHERE KEPT, AND WHICH YEARS

TAX PREPARER OR CPA AND PHONE

ESTIMATED TAX PAYMENTS: DATES AND PAID FROM

TAX PAYMENT AND IRS OR FTB LETTERS: WHERE KEPT

The IRS generally suggests keeping records 3 years after you file, and longer in some cases. Source 31 on the Sources page.

Memberships & rewards programs

PROGRAM OR CLUB	MEMBER NO. LAST 4	POINTS OR BALANCE	CAN TRANSFER?
			☐
			☐
			☐
			☐
			☐
			☐

Airline, hotel, credit card and store programs each set their own rules for points after a death. Check the terms.



PART 3 · EVERYDAY LIFE

Business interests

If you own all or part of a business, your family and partners need to know how it runs and what you want to happen to it.

BUSINESS NAME

MY OWNERSHIP %

ENTITY TYPE

☐ Sole proprietor ☐ LLC ☐ S corp ☐ C corp ☐ Partnership ☐ Professional corp

STATE FORMED AND YEAR

EIN LETTER: WHERE KEPT

CO-OWNERS OR PARTNERS

OPERATING, PARTNERSHIP OR BUY-SELL AGREEMENT: WHERE KEPT

WHO CAN RUN IT DAY TO DAY

BUSINESS ATTORNEY AND PHONE

BUSINESS CPA AND PHONE

BUSINESS BANK AND LAST 4

KEY PERSON OR LIABILITY INSURANCE

LICENSES AND PERMITS

RECORDS AND LOGIN INSTRUCTIONS: WHO HOLDS THEM

MY WISHES FOR THE BUSINESS (SELL, TRANSFER, CLOSE) AND TO WHOM

SECOND BUSINESS OR SIDE INCOME

NAME AND TYPE

OWNERSHIP % AND PARTNERS

AGREEMENT: WHERE KEPT



PART 3 · EVERYDAY LIFE

Pets

Who will care for your animals, and what they need, so there's no gap in care.

PET 1

NAME

SPECIES AND BREED

AGE

MICROCHIP NUMBER

VETERINARIAN AND PHONE

MEDICATIONS AND DIET

PET INSURANCE

FUNDS SET ASIDE

CAREGIVER IF I CAN'T

BACKUP CAREGIVER

PET 2

NAME

SPECIES AND BREED

AGE

MICROCHIP NUMBER

VETERINARIAN AND PHONE

MEDICATIONS AND DIET

PET INSURANCE

FUNDS SET ASIDE

CAREGIVER IF I CAN'T

BACKUP CAREGIVER

PET 3

NAME

SPECIES AND BREED

AGE

MICROCHIP NUMBER

VETERINARIAN AND PHONE

MEDICATIONS AND DIET

PET INSURANCE

FUNDS SET ASIDE

CAREGIVER IF I CAN'T

BACKUP CAREGIVER

CARE NOTES: ROUTINES, HABITS, HEALTH HISTORY, FAVORITE THINGS

PET TRUSTS

California allows a trust for the care of an animal during its lifetime (Probate Code § 15212). Ask your attorney if one fits your plan, and talk with your caregiver first.

Source 19 on the **Sources page**.



PART 3 · EVERYDAY LIFE

Grab-and-go kit & home inventory

Wildfire and earthquake season come every year in the Bay Area. A packed bag and a current home inventory make an evacuation calmer and an insurance claim much easier.

GO BAG CHECKLIST

- ☐ Water: one gallon per person per day, for several days
- ☐ Several days of non-perishable food
- ☐ Prescriptions, glasses and hearing aids
- ☐ Copies of IDs, insurance cards and policies
- ☐ Phone chargers and a battery pack
- ☐ Flashlight, radio and extra batteries
- ☐ First aid kit and N95 masks
- ☐ Cash and a credit card
- ☐ Pet food, leash, carrier and records
- ☐ Sturdy shoes and a change of clothes

Sources 24 and 25 on the **Sources page**.

OUR PLAN

GO BAG KEPT AT _____ **LAST CHECKED** _____

OUT-OF-AREA CONTACT AND PHONE _____

MEETING PLACE NEAR HOME _____

MEETING PLACE OUTSIDE THE AREA _____

TWO WAYS OUT OF THE NEIGHBORHOOD _____

EMERGENCY ALERTS SIGNED UP FOR _____

EARTHQUAKE READY

- ☐ Water heater strapped
- ☐ Heavy furniture secured
- ☐ Earthquake insurance reviewed
- ☐ Gas shutoff wrench by the meter

Utility shutoffs are on the **Emergency contacts** page. Source 26.

Home inventory for insurance

ROOM	ITEM AND DESCRIPTION	BRAND OR SERIAL NO.	YEAR BOUGHT	APPROX. VALUE	RECEIPT OR PHOTO: WHERE

VIDEO WALK-THROUGH LAST UPDATED _____

PHOTOS AND INVENTORY STORED (CLOUD OR OFF-SITE) _____

Record a slow video of every room, open closets and drawers, and keep a copy off-site or in the cloud. Update it after big purchases. Source 27 on the **Sources page**.

PART 4 · LEGAL & WISHES

Safe deposit box & original documents

Originals matter. Courts and title companies often need the signed original of a will or deed.



SAFE DEPOSIT BOX

BANK AND BRANCH

BOX NUMBER

KEY: WHERE KEPT

OTHERS AUTHORIZED TO OPEN IT

HOME SAFE OR LOCKBOX

WHERE IT IS

WHO KNOWS THE COMBINATION (NOT THE CODE)

WHO HAS A KEY

FIRE AND WATER RESISTANT?

Where the originals are

DOCUMENT	WHERE THE ORIGINAL IS	COPIES WITH	ORIGINAL?	UPDATED
Will and any codicils			☐	
Trust and amendments			☐	
Financial power of attorney			☐	
Advance health care directive			☐	
HIPAA authorization			☐	
Property deeds			☐	
Vehicle titles			☐	
Birth certificates			☐	
Marriage or partnership certificate			☐	
Divorce decree or settlement			☐	
Prenuptial agreement			☐	
Military discharge (DD-214)			☐	
Passports			☐	
Social Security cards			☐	
Recent tax returns			☐	
Insurance policies			☐	
Business agreements			☐	
Cemetery deed or pre-need contract			☐	
Adoption or citizenship papers			☐	



PART 4 · LEGAL & WISHES

Will & trust

Record what you have in place today. If you don't have these yet, the **trust and tax advisor guide** walks you through it.

WILL

☐ Have a will ☐ In progress ☐ Not yet

TYPE

☐ Attorney-drafted ☐ Pour-over will

☐ California statutory will ☐ Handwritten

DATE SIGNED

LATEST CODICIL

EXECUTOR

ALTERNATE EXECUTOR

ATTORNEY WHO PREPARED IT

ORIGINAL KEPT AT

REVOCABLE LIVING TRUST

☐ Have a trust ☐ In progress ☐ Not yet

TRUST NAME

DATE SIGNED

LATEST AMENDMENT OR RESTATEMENT

TRUSTEE(S)

SUCCESSOR TRUSTEE(S)

ATTORNEY

ORIGINAL KEPT AT

CERTIFICATION OF TRUST: COPIES AT

What has been moved into the trust

ASSET	TITLED TO TRUST OR BENEFICIARY UPDATED	DATE	DONE
Home			☐
Other real estate			☐
Bank accounts			☐
Investment accounts			☐
Business interests			☐
Personal property (assignment)			☐
Retirement and life insurance beneficiaries			☐

See **Step 6: Fund the trust** for what each item usually involves.

PART 4 · LEGAL & WISHES

Power of attorney & guardianship

Who can act for you financially if you can't, and who you would want to raise your minor children.

Durable power of attorney for finances

ITEM	YOU	SPOUSE / PARTNER
Signed? Date		
Agent (attorney-in-fact)		
Agent phone		
Alternate agent		
Alternate phone		
Effective now or on incapacity		
Attorney who prepared it		
Original kept at		
Banks or firms given a copy		

Other legal documents

DOCUMENT	DATE SIGNED	WHERE KEPT	NOTES
Community property agreement			
Revocable transfer on death deed			
HIPAA authorization			
Other			

Guardianship nominations for minor children

GUARDIAN OF THE PERSON

Raises your children day to day.

FIRST CHOICE _____ PHONE _____

ALTERNATE _____ PHONE _____

GUARDIAN OF THE ESTATE

Manages money left to minors, if not held in a trust.

FIRST CHOICE _____ PHONE _____

ALTERNATE _____ PHONE _____

WHERE THE NOMINATION IS WRITTEN (WILL, FORM GC-211, OTHER)

SPECIAL NEEDS TRUST OR PLANNING FOR A DEPENDENT

- ☐ Guardians have agreed to serve
- ☐ Guardians know where this organizer is

A parent can nominate a guardian in a will or other signed writing. A court still makes the appointment, giving weight to your nomination.

Sources 2 and 15 on the **Sources page**.



PART 4 · LEGAL & WISHES

Final wishes & funeral

Writing these down spares your family from guessing during a hard week. Share them with the people who will carry them out.

ARRANGEMENTS

☐ Burial ☐ Cremation ☐ Green burial

☐ Body donation ☐ No preference

FUNERAL HOME OR MORTUARY AND PHONE

CEMETERY, PLOT OR NICHE

CEMETERY DEED: WHERE KEPT

PRE-NEED CONTRACT: COMPANY

CONTRACT: WHERE KEPT

☐ Registered organ and tissue donor

☐ Veteran: request military honors

SERVICE

☐ Funeral ☐ Memorial ☐ Celebration of life

☐ Graveside ☐ Private ☐ None

PLACE

OFFICIANT

RELIGIOUS OR CULTURAL TRADITIONS

MUSIC

READINGS

SPEAKERS OR PALLBEARERS

CLOTHING, JEWELRY OR ITEMS TO INCLUDE

PHOTOS FOR THE SERVICE OR OBITUARY: WHERE

MEMORIAL GIFTS IN LIEU OF FLOWERS TO

PERSON I WANT TO CARRY OUT THESE WISHES

ANYTHING ELSE I'D LIKE MY FAMILY TO KNOW

California's Cemetery and Funeral Bureau publishes a free consumer guide on costs, pre-need contracts and your rights. You can also give your health care agent authority over final arrangements in your advance directive.

Sources 6 and 22 on the **Sources page**.

PART 4 · LEGAL & WISHES

People & groups to notify

Friends, employers, clubs, faith communities and organizations that should hear the news personally.

NAME OR ORGANIZATION	RELATIONSHIP	PHONE OR EMAIL	NOTIFIED
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐

OBITUARY NOTES

LETTERS TO LOVED ONES

PERSONAL LETTERS OR VIDEO MESSAGES: WHERE

FAMILY HISTORY, RECIPES, PHOTOS: WHERE

PART 4 · LEGAL & WISHES

Letter to loved ones

Not a legal document, just your voice. Share what you value, the stories you want remembered and what you hope for the people you love.



TO

DATE

WHAT MATTERS MOST TO ME

STORIES I WANT REMEMBERED

LESSONS I'VE LEARNED

MY HOPES FOR YOU

MY LETTER

SIGNED

RECORDED A VIDEO OR AUDIO MESSAGE TOO? WHERE

This letter doesn't change your will or trust. If a specific item should go to someone, tell your attorney.

PART 4 · LEGAL & WISHES

Charitable giving

The causes you support now, and any gifts you plan to leave. Your CPA can help you pick the most tax-efficient way to give.



Current giving

ORGANIZATION	CONTACT	ANNUAL AMOUNT	HOW YOU GIVE (CASH, STOCK, DAF, IRA)	PLEDGE OR RECURRING?

Planned gifts

ORGANIZATION	TYPE OF GIFT	AMOUNT OR %	DOCUMENTED IN

DONOR-ADVISED FUND: SPONSOR AND SUCCESSOR

CHARITABLE TRUST: NAME AND TRUSTEE

WAYS TO GIVE LATER

- A gift in your will or trust
- Naming a charity as beneficiary of an account
- If you're 70½ or older, a qualified charitable distribution from an IRA

Source 23 on the **Sources page**.



PART 4 · LEGAL & WISHES

The first 30 days

A practical checklist for the people you leave in charge. It isn't legal advice: your attorney, executor or successor trustee will guide the legal steps.

FIRST FEW DAYS

- ☐ Call the doctor or hospice, or 911 if the death was unexpected
- ☐ Tell close family and friends (see **Emergency contacts**)
- ☐ Care for dependents and **pets**
- ☐ Lock the home and car, and collect the mail
- ☐ Find this organizer, the will or trust and **final wishes**
- ☐ Call the funeral home. It usually reports the death to Social Security

FIRST TWO WEEKS

- ☐ Order certified death certificates. Many institutions ask for one
- ☐ Call the attorney named in this organizer
- ☐ Tell the employer and ask about final pay and benefits
- ☐ Ask Social Security about survivor benefits
- ☐ If a veteran, ask the VA about burial benefits
- ☐ Keep paying the mortgage, insurance and utilities

BY DAY 30

- ☐ Notify banks, investment firms and pension plans
- ☐ Start life **insurance** claims
- ☐ Notify the credit bureaus and cancel credit cards
- ☐ Cancel **subscriptions and memberships**
- ☐ Handle **digital accounts** as wished
- ☐ Gather records for the final tax return

WAIT BEFORE YOU ACT

Don't sell, give away or divide property, and don't pay estate debts from your own money, until the attorney, executor or successor trustee says it's time.

Who is helping

TASK	PERSON	PHONE	DONE
Funeral arrangements			☐
Death certificates			☐
Home, mail and pets			☐
Accounts and bills			☐
Insurance and benefit claims			☐
Digital accounts			☐
Calls to family and friends			☐

DEATH CERTIFICATES ORDERED: HOW MANY, AND FROM WHERE

WHERE THE WILL, TRUST AND THIS ORGANIZER ARE KEPT

Funeral homes generally report a death to Social Security. Any Social Security payment for the month of death must be returned. Sources 28, 29, 30 and 32 on the **Sources page**.



PART 5 · TRUST & TAX GUIDE

Getting started with a trust and tax advisor

A step-by-step walkthrough for Californians who don't have a plan yet, or haven't looked at it in years. Each step ends with a checklist.

1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

1 Understand a will vs. a revocable living trust

	Will	Revocable living trust
What it does	Says who receives your property and names an executor and guardians for minor children.	Holds the assets you transfer into it. You usually serve as trustee; a successor trustee takes over later.
When it works	Only after death, through the court.	As soon as it's signed and funded, during life and after.
Probate	Property passing under a will generally goes through probate unless a simpler process applies.	Assets titled in the trust generally pass without probate.
Privacy	Probate filings are public court records.	Generally stays private.
If you can't manage things	Doesn't help. You still need a power of attorney.	Your successor trustee can manage trust assets.
Upfront effort	Usually simpler and less costly to set up.	More work: assets must be retitled ("funded").
Guardians for children	Yes, you nominate them here.	No. Pair it with a "pour-over" will.

Many California homeowners use both: a trust that holds the main assets and a pour-over will that sends anything left out into the trust. Either way, you'll also want a financial power of attorney and an advance health care directive.

Key roles, in plain English

EXECUTOR
Named in your will. Handles probate, pays debts and distributes property under court supervision.

SUCCESSOR TRUSTEE
Named in your trust. Manages and distributes trust assets, usually without going to court.

FINANCIAL AGENT
Named in your durable power of attorney. Handles money matters if you can't, while you're living.

HEALTH CARE AGENT
Named in your advance health care directive. Makes medical decisions when you can't.

YOUR STEP 1 CHECKLIST

- ☐ List what you own and how each item is titled (**Part 2** of this organizer).
- ☐ Decide who you trust to act for you: executor or successor trustee, agents and guardians.
- ☐ Write down what matters most: avoiding probate, privacy, care for children or a dependent, giving to charity.
- ☐ Read the California Courts self-help guide on wills, trusts and estate planning (sources 1 and 2).

PART 5 · TRUST & TAX GUIDE

Why California probate matters

Probate is the court process for settling an estate. In California it is public and court-supervised, and its fees are set by law.



1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

2 Know what probate could cost your family

California sets "statutory" fees for both the executor and the executor's attorney as a percentage of the estate's value: 4% of the first $100,000, 3% of the next $100,000, 2% of the next $800,000 and 1% of the next $9 million.

The value used is the gross value, without subtracting the mortgage. A home worth $1.5 million with a $900,000 loan still counts as $1.5 million.

Calculated from Probate Code §§ 10800 and 10810 (source 5). Court costs, appraisal fees and any extra fees a court approves are not included.

GROSS ESTATE	EXECUTOR FEE	ATTORNEY FEE	COMBINED
$500,000	$13,000	$13,000	**$26,000**
$1,000,000	$23,000	$23,000	**$46,000**
$1,500,000	$28,000	$28,000	**$56,000**
$2,000,000	$33,000	$33,000	**$66,000**
$3,000,000	$43,000	$43,000	**$86,000**

Ways property can pass outside probate

LIVING TRUST
Assets titled in the trust pass under its terms.

BENEFICIARY FORMS
Life insurance, retirement accounts, POD and TOD accounts.

SURVIVORSHIP TITLE
Joint tenancy or community property with right of survivorship.

TRANSFER ON DEATH DEED
A recorded deed naming who receives a home (Probate Code § 5642).

SMALL ESTATES
For deaths on or after April 1, 2025, a simpler process can apply when the estate is up to $208,850.

PRIMARY HOME PETITION
A shorter court petition can apply to a main home worth up to $750,000.

Small-estate limits and exclusions are explained by the California Courts (source 3); limits are updated every three years. Each option has trade-offs for taxes and control, so choose with your attorney and CPA.

MY ROUGH NUMBERS (FOR PLANNING ONLY)

GROSS VALUE OF CALIFORNIA PROPERTY I OWN	AMOUNT ALREADY SET TO PASS OUTSIDE PROBATE	HOW MY HOME'S TITLE IS HELD TODAY

YOUR STEP 2 CHECKLIST

- [ ] Check how the title to your home is held (see your deed, or ask us to pull the vesting).
- [ ] Confirm beneficiaries on every retirement account and life insurance policy.
- [ ] Estimate the gross value of what you own in California, including your home.
- [ ] Read the California Courts overview of formal probate (source 4).

PART 5 · TRUST & TAX GUIDE

Choosing an estate planning attorney

Look for someone who focuses on estate planning, explains things clearly and quotes fees up front.

1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

3 Find and vet an estate attorney

WHERE TO LOOK

- Referrals from friends, your CPA or financial advisor, or us.
- The State Bar of California lists attorneys certified as specialists in **Estate Planning, Trust & Probate Law** (source 8).
- Confirm any attorney's license and discipline history with the State Bar's Attorney Search (source 9).
- Read the State Bar's free pamphlet, "What Consumers Should Know Before Hiring an Attorney" (source 10).

ATTORNEYS I'M CONSIDERING

NAME AND FIRM	PHONE	CONSULT DATE

QUESTIONS TO ASK

- ☐ How much of your practice is estate planning?
- ☐ Flat fee or hourly? Exactly what's included: trust, pour-over will, powers of attorney, health care directives?
- ☐ Will you prepare and record the deed that moves our home into the trust?
- ☐ Who retitles our other accounts: your office or us? Do you give us written funding instructions?
- ☐ How do you handle updates later, and what do they cost?
- ☐ Who keeps the signed originals?
- ☐ How will you coordinate with our CPA and financial advisor?
- ☐ What happens to our file if you retire?
- ☐ Do we need special planning for a blended family, a dependent with special needs, a business or out-of-state property?

A TYPICAL CALIFORNIA TRUST-BASED PLAN

- Revocable living trust
- Pour-over will, with guardian nominations if you have minor children
- Durable power of attorney for finances
- Advance health care directive and HIPAA authorization
- Certification of trust, to show banks
- Deed moving your home into the trust
- Assignment of personal property

CONSULTATION NOTES

YOUR STEP 3 CHECKLIST

- ☐ Shortlist two or three attorneys and confirm each license with the State Bar.
- ☐ Book consultations and ask for fee quotes in writing.
- ☐ Choose your attorney and sign an engagement letter that lists what's included.

PART 5 · TRUST & TAX GUIDE

Choosing a CPA or tax advisor

Your tax advisor helps you understand the income, gift and property tax side of your plan, now and for your heirs.

1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

4 Bring a tax advisor into the plan

VERIFY CREDENTIALS

- **CPAs:** check status and discipline with the California Board of Accountancy License Lookup (source 11).
- **Other tax preparers:** the IRS explains credentials such as enrolled agents and how to choose (source 12).
- **Financial advisors:** look them up on FINRA BrokerCheck or the SEC's adviser search (source 13).
- **Insurance agents:** check the California Department of Insurance license lookup (source 14).

ADVISORS I'M CONSIDERING

NAME AND FIRM	CREDENTIAL	PHONE

QUESTIONS TO ASK

- ☐ Do you prepare trust and estate income tax returns (Form 1041) and gift tax returns (Form 709)?
- ☐ How would "basis" work if our children inherit our home or investments?
- ☐ How could Proposition 19 affect passing our home to our children?
- ☐ Should our retirement accounts name a trust, a person or a charity?
- ☐ Will you coordinate with our estate attorney before documents are signed?
- ☐ What do you charge for planning advice versus return preparation?
- ☐ Who would our successor trustee call in your office?

TAX RECORDS YOUR FAMILY MAY NEED

- Recent federal and California income tax returns
- Any gift tax returns you've filed
- Purchase and improvement records for your home and other property
- Cost-basis records for investments
- Year-end statements for retirement accounts

CONSULTATION NOTES

YOUR STEP 4 CHECKLIST

- ☐ Confirm your CPA's license and ask whether they handle trust and estate returns.
- ☐ Share your attorney's draft plan with your CPA before you sign.
- ☐ Add both advisors to the **Key advisors page**.



PART 5 · TRUST & TAX GUIDE

What to bring to your first meeting

Bring this organizer. Most of what an attorney asks for is already in it.

1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

5 Gather your documents

PEOPLE & EXISTING DOCUMENTS

- ☐ This organizer, filled in as far as you can
- ☐ Photo ID for each person signing
- ☐ Names and contact details for executors, trustees, agents and guardians you're considering
- ☐ Any existing will, trust, powers of attorney or health care directive
- ☐ Prenuptial agreement, divorce decree or settlement
- ☐ Notes on any child or dependent with special needs

PROPERTY & MONEY

- ☐ Deeds for every property you own
- ☐ Recent mortgage and HELOC statements
- ☐ Recent statements for bank, brokerage and retirement accounts
- ☐ Current beneficiary forms for retirement accounts and life insurance
- ☐ Life and long-term care insurance policies
- ☐ Business agreements: operating, partnership or buy-sell
- ☐ Recent federal and California tax returns

Who I'm considering for each role

ROLE	FIRST CHOICE	BACKUP	PHONE	ASKED?
Successor trustee				☐
Executor				☐
Financial agent (POA)				☐
Health care agent				☐
Guardian for children				☐

YOUR WISHES

- ☐ Who should receive what, including specific items
- ☐ Gifts to charity
- ☐ How and when children or grandchildren should receive money
- ☐ Your questions from Steps 3 and 4

ATTORNEY MEETING DATE AND TIME

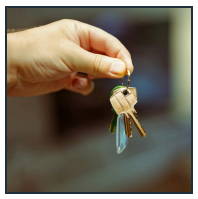
CPA MEETING DATE AND TIME

QUESTIONS I DON'T WANT TO FORGET

PART 5 · TRUST & TAX GUIDE

Funding the trust, including your home

A trust only controls what's titled in its name. "Funding" means moving assets in, and it's the step people most often leave unfinished.



1 Will or trust? · 2 Why probate matters · 3 Choose an attorney · 4 Choose a CPA · 5 What to bring · 6 Fund the trust · 7 Review & update

6 Move your assets into the trust

RETITLING YOUR HOME

1. Your attorney prepares a new deed transferring the home to you as trustees of your trust.
2. You sign it before a notary. It's recorded with the county recorder, usually with a Preliminary Change of Ownership Report.
3. A transfer into your revocable trust is excluded from property tax reassessment (Revenue & Taxation Code § 62; source 16).
4. Federal law generally bars your lender from calling the loan when you move your home into a living trust and remain a beneficiary and occupant (source 21).
5. Ask your insurer to add the trust to your homeowners policy.
6. Keep a copy of the recorded deed with your trust.

OTHER ASSETS

- **Bank and brokerage:** retitle to the trust, or name it as POD or TOD beneficiary, as your attorney advises.
- **Retirement accounts and HSAs:** usually not retitled. Update beneficiaries with your CPA's input.
- **Life insurance:** name the right beneficiary for your plan.
- **Business interests:** assign them per your operating or partnership agreement.
- **Personal property:** often covered by a general assignment.
- **Future purchases:** buy in the trust's name. We coordinate the vesting with escrow and your attorney.

After a refinance, some lenders ask you to take the home out of the trust. Check that it's deeded back afterward.

Funding tracker

ASSET	INSTITUTION	ACTION TAKEN	DATE	DONE
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐



PART 5 · TRUST & TAX GUIDE

Reviewing your plan

Plans age. A good rule of thumb is a review every 3 to 5 years, and right away after a major life event.

1 Will or trust? | 2 Why probate matters | 3 Choose an attorney | 4 Choose a CPA | 5 What to bring | 6 Fund the trust | 7 Review & update

7 Review every 3 to 5 years, or after life events

REVIEW RIGHT AWAY AFTER

- ☐ Marriage, divorce or a new partner
- ☐ A birth, adoption or grandchild
- ☐ The death or illness of anyone named in your plan
- ☐ A child turning 18
- ☐ Buying, selling or refinancing real estate

ALSO REVIEW AFTER

- ☐ Moving to or from California
- ☐ Starting, buying or selling a business
- ☐ A large inheritance, windfall or loss
- ☐ Retirement or a change in health
- ☐ Changes in tax law your CPA flags

Review log

DATE	WHAT WE REVIEWED OR CHANGED	WITH (ADVISOR)	NEXT REVIEW

EACH YEAR, A 15-MINUTE CHECK

- ☐ Update this organizer and the “Last reviewed” date on the cover.
- ☐ Confirm every new account is titled to the trust or has the right beneficiary.
- ☐ Make sure your agents, trustees and guardians are still willing and able.

LIFE TRANSITIONS

How we can help with the real estate side



Estate planning and moving often go hand in hand. We help families across Walnut Creek and the Bay Area through these changes, working alongside your attorney, CPA and trustee.

RIGHTSIZING
Selling a longtime family home and finding one that fits the next chapter, timed so you move once.

INHERITED & TRUST HOMES
Helping trustees and executors prepare, price and sell, with your attorney guiding the legal steps.

BUYING IN A TRUST
Coordinating vesting with escrow and your attorney so a new home goes straight into your trust.

VALUE SNAPSHOTS
A market analysis to help you plan. For tax values, your CPA may also want a licensed appraiser.

PREPARING TO SELL
Trusted local help with cleanouts, estate sales, repairs and staging.

MOVING CLOSER TO FAMILY
Finding the right home near the people who matter, across the Bay Area or beyond through our network.



YOUR REAL ESTATE TEAM

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I'D LIKE HELP WITH

- [ ] A market value snapshot of my home
- [ ] A rightsizing or moving timeline
- [ ] Introductions to estate attorneys or CPAs
- [ ] Selling a trust or inherited property
- [ ] Buying a home in my trust's name
- [ ] Local movers, cleanouts or estate sales

NOTES FROM OUR CONVERSATION

We are real estate professionals, not attorneys or tax advisors. We're happy to introduce you to local estate attorneys and CPAs, and we coordinate with them so the real estate side runs smoothly.



NOTES

Notes

Anything that doesn't fit elsewhere: instructions, stories, the location of something important.

REFERENCE

Sources & disclaimer

Official public sources used in this organizer. Laws, forms and dollar limits change, so check the current version before you act. Links checked October 2026.

1. California Courts Self-Help Guide: Wills, estates, and probate
   selfhelp.courts.ca.gov/wills-estates-probate
2. California Courts: Wills, estates, and advance care planning (legal documents)
   selfhelp.courts.ca.gov/.../legal-documents
3. California Courts: When formal probate may not be needed (small-estate limits)
   selfhelp.courts.ca.gov/probate/simple-transfer
4. California Courts: Overview of formal probate
   selfhelp.courts.ca.gov/probate/formal-probate
5. California Probate Code §§ 10800 and 10810 (statutory compensation)
   leginfo.legislature.ca.gov
6. California Attorney General: Advance care planning and Advance Health Care Directive form
   oag.ca.gov/consumers/general/care
7. California Secretary of State: Advance Health Care Directive Registry
   www.sos.ca.gov/...
8. State Bar of California: Find a Certified Specialist
   www.calbar.ca.gov/.../find-certified-specialist
9. State Bar of California: Attorney Search
   apps.calbar.ca.gov/.../QuickSearch
10. State Bar of California: Legal Guide Pamphlets, incl. “What Consumers Should Know Before Hiring an Attorney”
    www.calbar.ca.gov/.../legal-guide-pamphlets
11. California Board of Accountancy: License Lookup
    www.dca.ca.gov/cba/consumers/license-lookup.shtml
12. IRS: Choosing a tax professional
    www.irs.gov/.../choosing-a-tax-professional
13. FINRA BrokerCheck and SEC Investment Adviser Public Disclosure
    brokercheck.finra.org
14. California Department of Insurance: Check a license
    cdicloud.insurance.ca.gov/cal
15. California Courts: Form GC-211, Nomination of Guardian
    selfhelp.courts.ca.gov/jcc-form/GC-211
16. California State Board of Equalization: Change in ownership FAQs (Rev. & Tax. Code § 62)
    boe.ca.gov/proptaxes/faqs/changeinownership.htm
17. California Probate Code § 5642 (revocable transfer on death deed)
    leginfo.legislature.ca.gov
18. California Probate Code §§ 870–884 (fiduciary access to digital assets)
    leginfo.legislature.ca.gov
19. California Probate Code § 15212 (trusts for the care of animals)
    leginfo.legislature.ca.gov
20. NAIC Life Insurance Policy Locator
    eapps.naic.org/life-policy-locator
21. 12 U.S.C. § 1701j-3(d)(8) (transfers into an inter vivos trust)
    uscode.house.gov
22. California Cemetery and Funeral Bureau: Consumer Guide to Funeral and Cemetery Purchases
    cfb.ca.gov/consumer/consumer_guide.pdf
23. IRS: Retirement plan FAQs regarding IRAs (qualified charitable distributions)
    www.irs.gov/.../retirement-plans-faqs-regarding-iras
24. Ready.gov: Build a kit
    www.ready.gov/kit
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    www.readyforwildfire.org/.../Emergency-Supply-Kit
26. Earthquake Country Alliance: Seven Steps to Earthquake Safety
    www.earthquakecountry.org/sevensteps
27. California Department of Insurance: Home Inventory Guide
    www.insurance.ca.gov/.../home-inv.cfm
28. Social Security Administration: What to do when someone dies
    www.ssa.gov/personal-record/when-someone-dies
29. USAGov: Agencies to notify when someone dies
    www.usa.gov/report-a-death
30. IRS: File the final income tax returns of a deceased person
    www.irs.gov/...
31. IRS: How long should I keep records?
    www.irs.gov/.../how-long-should-i-keep-records
32. U.S. Department of Veterans Affairs: Burials and memorials
    www.va.gov/burials-memorials
33. California DHCS: Medi-Cal
    www.dhcs.ca.gov/services/medi-cal
34. California Department of Social Services: In-Home Supportive Services
    www.cdss.ca.gov/in-home-supportive-services

IMPORTANT: NOT LEGAL OR TAX ADVICE

This organizer is general information to help you collect your records and prepare for conversations with licensed professionals. It is not legal, tax, financial or insurance advice, and it does not create an attorney-client or advisor relationship. Estate planning depends on your circumstances and on laws that change. Consult a California-licensed attorney and a qualified tax professional before you sign documents, change titles or name beneficiaries. Quinley Realty and Keller Williams Elevate do not provide legal or tax advice.

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