



# LA VAKIL

ESTATE · INSURANCE · REAL ESTATE

## Life & Estate Planner

*A keepsake & working guide for  
your family, your assets, and your wishes.*

— LICENSED & PERSONALIZED TO —

*Your Name Here*



# A Letter to You.

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What's in this book is not legal. It is simply a place — a single, quiet place — for the pieces of a life.

Where the insurance policies live. Where the passwords are kept. Who the children go to, and who holds the keys. The name of the person who feeds the dog if something happens to you.

We made this because every family we've helped told us the same thing: "We wish we had it all in one place." Now you do. Fill it in slowly, update it once a year, and hand it to the people you love.

The work you do here will save your family hours, and sometimes days, of searching. That is not a small thing.

*With care,*

**Shekhar Chikhalikar, Esq.**

SNC Law Office · CA Bar #249708

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# PERSONAL & FAMILY

The most important people in your life.

## YOUR INFORMATION

FULL LEGAL NAME

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DATE OF BIRTH

SSN (LAST 4 ONLY)

PHONE

EMAIL

STREET ADDRESS

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CITY

STATE / ZIP

MARITAL STATUS (SINGLE / MARRIED / DOMESTIC PARTNER / WIDOWED / DIVORCED)

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# PERSONAL & FAMILY (CONTINUED)

Spouse, children, emergency contacts.

## SPOUSE / PARTNER

FULL NAME

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DATE OF BIRTH

SSN (LAST 4 ONLY)

PHONE

EMAIL

## CHILDREN

FULL NAME	DATE OF BIRTH	PHONE	NOTES / SPECIAL NEEDS

## EMERGENCY CONTACTS

NAME	RELATIONSHIP	PHONE	EMAIL

# ASSETS & REAL ESTATE

A complete picture of what you've built.

## REAL ESTATE

PROPERTY ADDRESS	TYPE	TITLE HELD	EST. VALUE

## BANK & FINANCIAL ACCOUNTS

INSTITUTION	ACCOUNT TYPE	BENEFICIARY	EST. VALUE

# ASSETS & REAL ESTATE (CONTINUED)

Retirement, investments, other assets.

RETIREMENT & INVESTMENTS			
INSTITUTION	TYPE (IRA/401K/BROKERAGE)	BENEFICIARY	EST. VALUE

**OTHER ASSETS**

VEHICLES (YEAR / MAKE / MODEL / VALUE)

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BUSINESS INTERESTS (NAME / % OWNED / VALUE)

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VALUABLES (JEWELRY / ART / COLLECTIBLES)

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CRYPTOCURRENCY / DIGITAL ASSETS

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# DEBTS & CASH FLOW

Know what you owe and what you spend.

## DEBTS & LIABILITIES

CREDITOR	TYPE	BALANCE	RATE	MIN. PMT

## MONTHLY BILLS & SUBSCRIPTIONS

PAYEE	PURPOSE	AMOUNT	DUE DATE	AUTO-PAY?

# INSURANCE & PROTECTION

Policies that protect what you've built.

## INSURANCE POLICIES

TYPE	COMPANY	POLICY #	BENEFIT	BENEFICIARY	RENEWAL

■ **Tip:** When your home is transferred into a trust, your homeowners policy must be updated. Ask INSURED LA to review your coverage.

## INSURANCE AGENTS

AGENT NAME	COMPANY	PHONE	EMAIL	LINES

# LEGAL & DECISIONS

Your documents and decision-makers.

## TRUST & ESTATE DOCUMENTS

Do you have a Living Trust?     Yes     No — need to create one

### TRUST ATTORNEY / DATE SIGNED

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TRUSTEE NAME

SUCCESSOR TRUSTEE

LOCATION OF TRUST DOCUMENT

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WILL / POUR-OVER WILL LOCATION

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## POWERS OF ATTORNEY

FINANCIAL POA — AGENT

HEALTHCARE POA — AGENT

PHONE

PHONE

DATE SIGNED

DATE SIGNED

# LEGAL & DECISIONS (CONTINUED)

Healthcare directive & guardianship.

## HEALTHCARE DIRECTIVE & HIPAA

Advance Healthcare Directive?  Yes  No

Organ Donation?  Yes  No

### HIPAA AUTHORIZATION — AGENT NAME & PHONE

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### END-OF-LIFE PREFERENCES

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## GUARDIANS FOR MINOR CHILDREN

TEMPORARY GUARDIAN — NAME

PHONE

TEMPORARY GUARDIAN — ADDRESS

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PERMANENT GUARDIAN — NAME

PHONE

PERMANENT GUARDIAN — ADDRESS

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# DOCUMENT CONTROL

Where your important papers are stored.

## DOCUMENT LOCATION MAP

DOCUMENT	LOCATION	ACCESS INSTRUCTIONS	NOTES
Will / Trust			
Property Deeds			
Powers of Attorney			
Insurance Policies			
Tax Returns			
Birth / Marriage Certs			
Passports			

## SAFE, STORAGE & ACCESS

SAFE LOCATION

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SAFE CODE / COMBINATION

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SAFETY DEPOSIT BOX LOCATION

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KEY LOCATION

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**DIGITAL LIFE**

Online accounts and digital assets.

**ONLINE ACCOUNTS**

ACCOUNT TYPE	PLATFORM	USERNAME / EMAIL	NOTES / WISHES
Email			
Social Media			
Banking Online			
Investment Portal			
Cloud Storage			
Shopping			
Other			

**PASSWORD MANAGER**

PASSWORD MANAGER NAME (E.G. 1PASSWORD, LASTPASS)

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WHERE MASTER PASSWORD IS STORED

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# MEDICAL & PERSONAL CARE

Health info and care preferences.

## PHYSICIANS

PRIMARY CARE PHYSICIAN

PHONE

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SPECIALIST(S)

PHONE

## MEDICATIONS

MEDICATION	DOSAGE / FREQUENCY	PRESCRIBING DOCTOR

MEDICAL CONDITIONS

ALLERGIES

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## PET CARE

PET NAME	TYPE / BREED	CARE INSTRUCTIONS	CAREGIVER

# LEGACY & FINAL WISHES

Share your wishes. Leave a lasting impact.

## FUNERAL PREFERENCES

Final Resting Wishes:      Burial    Cremation    Other

Organ Donation Registered?      Yes    No

### FUNERAL HOME / PROVIDER NOTES

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### OTHER PREFERENCES (MUSIC, READINGS, FLOWERS, VENUE)

## SPECIFIC BEQUESTS

*e.g. "My grandmother's jewelry to my daughter Maya. The '67 Mustang to my brother."*

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# What This Planner Is — and Is Not.

## **This planner is NOT an estate plan.**

The LA VAKiL Life & Estate Planner is an organizational worksheet — a place to gather and record information about your life, your assets, and your wishes.

It is NOT a will, NOT a trust, NOT a power of attorney, and NOT a healthcare directive. Filling it in does NOT transfer your assets, does NOT name legal guardians, and does NOT avoid probate on its own.

## **It does NOT avoid probate.**

If you own California real estate, or financial accounts over roughly \$200,000 in your individual name (not in a trust, not jointly held, and without a named beneficiary), your estate will likely go through California probate — a public court process that can take 12–18 months and cost tens of thousands in fees.

To AVOID probate, you need a properly drafted and funded living trust.

## **The next step: talk to LA VAKiL.**

Bring this completed planner in for a free 10-minute review. LA VAKiL offers complete estate plans — living trust, pour-over will, powers of attorney, and healthcare directive — starting at \$500 (Will Package) and \$1,500 (Individual Trust Package).

Legal services provided by Shekhar Chikhalikar, Esq. · CA Bar #249708.



# LA VAKiL

ONE PLAN · TOTAL PROTECTION

■ LAESQUIRE

■ LAREALTI

■ INSURED LA

## A Gift to the People You Love

*This planner turns what is in your head into something your family can hold. Every account, every document, every wish — in one place.*

## Why Families in the Valley Use It

Used by families in Chatsworth, Northridge, Porter Ranch, Granada Hills, Woodland Hills, West Hills and Simi Valley before meeting their estate planner.

### LA VAKiL

Estate Planning · Real Estate · Insurance

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*Organizational tool only — not legal advice. No attorney–client relationship is created by use of this planner.*

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# LA VAKiL

ESTATE · REAL ESTATE · INSURANCE

CHECK OUT OUR  
SPECIAL OFFERS!

## For All Your Asset Needs.

*One family. Three services. Real savings when you bundle.*

### LA VAKiL secures what matters most to you.

Whether it is finding you a home, insuring it, or creating an estate plan to protect it — LA VAKiL is your single point of contact. Bundle our services and we reward you with free estate-planning value. Stack every offer below.

## SPECIAL OFFERS

REAL ESTATE

### LA REALTi

REAL ESTATE OFFER

**FREE** complete estate plan if you buy or sell your home through our real estate arm.

INSURANCE

### iNSUREDLA

INSURANCE OFFER

**FREE** updates to your current estate plan if you purchase insurance through iNSUREDLA.

ESTATE PLANNING

### LAESQUIRE

ESTATE PLANNING OFFER

**FREE** Last Will preparation & download if you purchase insurance through iNSUREDLA.

CONTACT US

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