

Estate Bee Third Edition | Trust Kit Worksheet

Example worksheet packet for organizing assets, directives, and trustee instructions.

A) Estate Inventory

Primary Residence Address

Bank/Investment Institutions

Business Interests

Digital Assets / Wallet Notes

B) Distribution Intent

Specific Gifts / Allocations

Residual Distribution Instructions

C) Required Attachments Checklist

- Government-issued IDs
- Property and account documentation
- Beneficiary contact list
- Medical directive / POA references

Prepared By: _____ Date: _____