



## Your Guide to Estate Planning



EXPERIENCE THE  
art.

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# PLANNING FOR THE FUTURE

This estate planning kit is designed as a practical tool to help A.R.T. donors like you organize your important information and begin the estate planning process with confidence and clarity. Thoughtful planning today ensures that your values, priorities, and the well-being of your loved ones are protected for years to come.

This record book serves as a starting point for drafting a formal estate plan with your attorney, which includes a set of legal documents that will outline your wishes regarding the distribution of your assets, your health care directives, and the care of any dependents after your lifetime. Without an estate plan, your plans and affairs may not be handled in accordance with your wishes.

After completing this book—a confidential resource where you can gather and update key information about your assets, liabilities, beneficiaries, and philanthropic intentions—you should share this document with your attorney, who can provide further legal counsel and draft the legal documents necessary to implement your wishes.

## Helpful Tips

1.

**Making a will is not a one-and-done project. Remember to update your plans, here and with your attorney, as your life changes: expanding your family, buying property, retiring, etc.**

2.

**While couples often share information included in this kit, we suggest you and your partner each prepare your own records, which will make it easier to update personal information as your circumstances may change.**

(Cover) The company of *WILD: A Musical Becoming*: Maggie Hall/Nile Scott Studios.

*The information in this publication is for educational purposes only and not intended as legal or tax advice. We encourage you to consult with your advisors and attorney to create the appropriate legal documents.*

# SHARING YOUR INTENTIONS

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While this book itself is not a legal document, we recommend sharing your completed records with whomever you intend to act as executor of your will, whether that is your partner, child, another loved one, or an attorney or advisor. This allows them to ask questions and ensures they understand your wishes, which often makes distribution of the estate much smoother.

Once your legal documents are finalized, it is important to ensure that your executor knows where to find them—and how to access them.

## Your Will

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Location

---

Date of will

---

Date of last review

---

Date(s) of any codicils

## Revocable Living Trust

---

Location

---

Date of trust

---

Date of last review

---

Date(s) of any amendments

## Safe-Deposit Box or Safe

---

Location/address

---

Box number

---

Location of key/combination

---

Location/address

---

Box number

---

Location of key/combination

# YOUR DIGITAL ESTATE

As you begin planning your estate, it's important to consider not only your physical and financial assets but also your digital estate. A digital estate includes all of your online accounts, digital files, social media profiles, emails, and other electronic assets that form your digital footprint. Properly accounting for your digital estate ensures that your loved ones have clear instructions on how to access, manage, or close these assets after your passing. Including these accounts in your planning also helps protect your privacy, prevents identity theft, and allows your wishes to be carried out effectively in the digital realm.

## Instructions and Passwords

Phone unlock code or location of unlock code

Computer password or location of password

Email login information: address(es) and password(s) or location of login information

## Other Accounts

Account type	User names	Passwords or location of passwords

## Additional Instructions

# PERSONAL INFORMATION

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## You

Full name (please include any aliases)

Address (include city, state, zip)

Phone

Email

Social Security number

Date and location of birth

Military service, branch, years of service

Location of tax records

## Your Spouse/Partner

Current spouse or partner's full name

Date of birth

Address (include city, state, zip)

Phone

Email

Social Security number

Date of marriage (if applicable)

Location of marriage certificate and prenuptial agreement document (if applicable)

Date of death and resting place (if applicable)

Location of death certificate

Former spouse or partner's full name

Date of marriage (if applicable)

Location of marriage certificate and prenuptial agreement document (if applicable)

Date of divorce, annulment, legal separation, or death (specify event)

Location of relevant documents

## Your Children and Grandchildren (attach additional pages or use notes section if more space is needed)

Child's full name

Date of birth

Child's partner's full name (if applicable)

Date of birth

Address

City, state, zip

Phone

Email

Grandchildren's full names/dates of birth/phones/emails

Child's full name

Date of birth

Child's partner's full name (if applicable)

Date of birth

Address

City, state, zip

Phone

Email

Grandchildren's full names/dates of birth/phones/emails

## Your Children and Grandchildren (attach additional pages or use notes section if more space is needed)

Child's full name

Date of birth

Child's partner's full name (if applicable)

Date of birth

Address

City, state, zip

Phone

Email

Grandchildren's full names/dates of birth/phones/emails

Child's full name

Date of birth

Child's partner's full name (if applicable)

Date of birth

Address

City, state, zip

Phone

Email

Grandchildren's full names/dates of birth/phones/emails

## Your Parents and Siblings (attach additional pages or use notes section if more space is needed)

**Parent 1 full name**

Address

Phone

Email

Date of death and resting place (if applicable)

Location of death certificate (if applicable)

**Parent 2 full name**

Address

Phone

Email

Date of death and resting place (if applicable)

Location of death certificate (if applicable)

**Sibling's full name**

Address

Phone

Email

**Sibling's full name**

Address

Phone

Email

**Sibling's full name**

Address

Phone

Email



## Additional Loved Ones (attach additional pages or use notes section if more space is needed)

Name/relationship

Address

Phone

Email

Name/relationship

Address

Phone

Email

## Pets

Pet's name, species, and coloring

Microchip/license number

Care notes (food, medication, etc.)

Pet's name, species, and coloring

Microchip/license number

Care notes (food, medication, etc.)

Pet's name, species, and coloring

Microchip/license number

Care notes (food, medication, etc.)

Veterinarian's contact information

Pet caretaker's name and contact info

Location of relevant documents

Additional notes

## Emergency Contacts

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**Name/relationship**

---

Phone

---

Email

---

**Name/relationship**

---

Phone

---

Email

---

**Name/relationship**

---

Phone

---

Email

## Advisors

---

**Primary physician**

---

Address

---

Phone

---

Email

---

**Dentist**

---

Address

---

Phone

---

Email

---

**Attorney**

---

Address

---

Phone

---

Email

---

**Financial advisor**

---

Address

---

Phone

---

Email

---

**Other**

---

Address

---

Phone

---

Email

---

**Other**

---

Address

---

Phone

---

Email

## Financial Power of Attorney

Check "yes" if you have a financial power of attorney

☐ Yes

Date prepared \_\_\_\_\_

---

### Document title

---

Prepared by (name, title, contact information)

---

Name and contact information of person appointed to act on your behalf

---

Names and contact information of alternates to act on your behalf

Effective date of action: ☐ Immediately ☐ Upon your incapacity ☐ Other

---

Location of original document

---

Location of copies (we recommend including a copy with this kit)

---

Notes

## Health Care Directives

*Please remember: This document is not a legal form. Be sure to consult your doctor and attorney to prepare the necessary paperwork.*

Check "yes" if you have a health care power of attorney

☐ Yes

Date prepared \_\_\_\_\_

---

### Document title

---

Prepared by (name, title, contact information)

Effective date of action: ☐ Immediately ☐ Upon your incapacity ☐ Other

---

Location of original document

---

Location of copies (we recommend including a copy with this kit)

Check "yes" if you have an advance health care directive or living will

☐ Yes

Date prepared \_\_\_\_\_

---

### Document title

---

Prepared by (name, title, contact information)

---

Location of original document

---

Locations of copies (we recommend including a copy with this kit)

## Long-Term Care Insurance

Check "yes" if you have a long-term care insurance policy

☐ Yes

---

Insurance agent's name and contact information

---

Company name

---

Policy number

---

Date of issue

---

Location of documents

## Body, Organ, and Tissue Donations

Check "yes" if you wish to donate your body, organs, or tissues

☐ Yes

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**Specific organ or tissue you would like to donate (or indicate entire body)**

---

Receiving organization's name and contact information

---

Location of relevant documents

# EMPLOYMENT

## Current Employment

Are you retired? ☐ Yes ☐ No

Do you have an ownership interest? ☐ Yes ☐ No

Company name and address

Supervisor

Phone

Current benefits and location of documents

Title

Start date (and end date, if applicable)

## Previous Employment

### Prior employer

Address

Phone

Position

Start

End

Active benefits

Location of documents

### Prior employer

Address

Phone

Position

Start

End

Active benefits

Location of documents

# CALCULATING YOUR ESTATE

Use the following pages to take note of your assets and liabilities to determine your estate's worth, which, when accounting for savings, life insurance, and retirement plan benefits, is often larger than many people realize. Listing your assets and liabilities will help you understand what you will be able to leave to your loved ones and any charitable organizations after you're gone.

## How to Determine Ownership

Below are some common types of co-ownership, although not all are listed here. Knowing the form of title of an asset is necessary to determine if you can pass it through your estate plan.

1. **Joint tenancy with rights of survivorship.** This type of property usually reverts to the surviving joint owner.
2. **Tenants-in-common.** The portion of the property you own will follow the instructions in your will; after your passing, your beneficiary will assume your share of ownership alongside the original tenant-in-common.
3. **Community property.** This is an additional form of co-ownership, applicable between spouses in certain states. With this form of ownership, each spouse holds a 50% share of the asset.

## Helpful Tips

1.

Make sure to specify whether the property is owned solely by you, jointly with another person, or under a different ownership arrangement. Refer to the box above for examples of common co-ownership types.

2.

List your assets using their current market value; it's not necessary to be exact.

3.

After you complete this inventory, use the sections that follow to consider how you would like your assets to be distributed. Your attorney can then help you prepare the necessary legal documents to implement your wishes.

## List Your Assets

### 1. Cash (checking accounts, savings, CDs, etc.)

Type of account	Financial institution	Value	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

### 2. Retirement Benefits (include the value of any life insurance you own through retirement plans)

Description	Beneficiary	Value	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

### 3. Real Estate

Description and location of property	Date of purchase	Cost basis	Value	Owned individually or jointly?
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

## List Your Assets

### 4. Personal Assets (art, vehicles, jewelry, other collections)

Description	Date of purchase	Value	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

### 5. Brokerage Accounts

Firm name	Value	Owned individually or jointly?
	\$	
	\$	
	\$	
	\$	
	\$	

### 6. Life Insurance

					Face amount (note any policy loans)
Name of company	Insured	Beneficiary	Current face value	Anticipated benefit	Owned individually or jointly?
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	

### 7. Annuities

					Present value
Description	Annuitant	Beneficiary	Cost basis	Value	Owned individually or jointly?
			\$	\$	
			\$	\$	
			\$	\$	



## List Your Assets

### 8. Charitable Annuities or Trusts

Charity name and contact information	Annuitant	Beneficiary	Cost basis	Value	Owned individually or jointly?
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	

### Helpful Tip

If you have a charitable gift annuity or charitable trust, remember to provide your executor or anyone managing your estate with the contact information for the issuing charity. This will help ensure that payments can be transferred to a surviving beneficiary, if applicable, or that the principal can be released to the charity according to your wishes. Use the notes section on page 26 for additional information as needed.

### 9. Business Interests Owned

Business name and address	Cost basis	Value	Value of interest
			Owned individually or jointly?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

### 10. Obligations Due to Me (accounts receivable, mortgages held, etc.)

Name of debtor	Address	Value	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	

## List Your Assets

### 11. Other Assets (cryptocurrency, patents, copyrights, etc.)

Description	Cost basis	Value	Owned individually or jointly?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

### 12. Future or Contingent Income or Assets

I (or my spouse/partner) am a beneficiary of a bequest.

Name of testator \_\_\_\_\_ Approximate value \_\_\_\_\_

I (or my spouse/partner) am a beneficiary of a trust fund.

Name of testator \_\_\_\_\_ Approximate value \_\_\_\_\_

I (or my spouse/partner) derive income from another source and/or asset

Description and value \_\_\_\_\_

*Bring copies of wills or trust documents to your attorney's office.*

**Total of all assets owned by you alone:** \_\_\_\_\_

**Total of all assets owned jointly:** \_\_\_\_\_

## Helpful Tip

**If you or your partner are a non-U.S. citizen or dual citizen, or if you have assets outside of the United States (even if you are a U.S. citizen), please consult with your attorney for the appropriate cross-border estate planning.**

## List Your Liabilities (approximate balances owed)

### 1. Mortgages

Description of property	Name of creditor	Amount	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	

### 2. Loans or Installment Debts (auto, personal, or bank loans, etc.)

Description	Name of creditor	Amount	Owned individually or jointly?
		\$	
		\$	
		\$	
		\$	
		\$	

### 3. Current Bills (credit cards, medical bills, etc.)

Description	Amount	Owned individually or jointly?
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	

### List Your Liabilities (approximate balances owed)

#### 4. Other Liabilities

[illegible]

## CONSIDERING YOUR PREFERENCES

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When considering long-term planning, you will need to determine who will act as the executor of your estate, as well as in other primary roles.

**Please note: Once you have determined your wishes using this kit, you will need to work with your attorney to draft and execute the appropriate legal documents necessary to implement your wishes.**

While determining these plans may be challenging, your loved ones will appreciate your proactive nature.

### Your Will

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#### Executor or personal representative

---

Address

---

Phone

---

#### Alternate personal representative

---

Address

---

Phone

---

#### Estate planning attorney

---

Address

---

Phone

**If you have a trust, please note below the trustee and beneficiaries:**

### Revocable Living Trust

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#### Trustee

---

Phone

---

Email

---

#### Successor trustee

---

Phone

---

Email

---

#### Beneficiary(ies)

## Guardian

If you have minor children, whom do you wish to name as their guardian?

---

### Guardian

Address

Phone

---

### Alternate Guardian

Address

Phone

## Funeral Preferences

While it may be challenging to consider, guidance you provide now can help your family and loved ones—emotionally and logistically.

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Funeral home and/or house of worship and contact information

**Type of preparation** ☐ Cremation ☐ Burial ☐ Donation of body

**Type of service** ☐ Religious ☐ Military ☐ Fraternal ☐ Memorial service with no casket present

**Funeral instructions** ☐ Closed casket ☐ Open casket ☐ Other: \_\_\_\_\_

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Additional instructions

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Charity(ies) in lieu of flowers

Notes (favorite flowers, song preferences, favorite religious texts, etc.)

# DISPOSITION OF YOUR ESTATE

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Now that you've identified your assets and thought about your long-term and end-of-life wishes, you can decide who you want to receive your assets. These can be your loved ones as well as charities, including the A.R.T. Many individuals make provisions for their favorite charities, such as their alma mater, a hospital where they received care, an animal shelter, or a local food bank; whatever causes are important to you, a gift from your estate can provide support to the organization while ensuring your legacy lives on.

Please remember that this guide is for educational and planning purposes only. Once you fill out the following pages, you will need to work with your attorney to draft and execute the appropriate legal documents necessary to implement your wishes.

## Questions to Consider

1. Do you wish to provide for your spouse, children, grandchildren, or friends?
2. Is there anyone you wish to omit from your estate plans?
3. How do you wish to provide for these individuals: outright or through a trust that may be accessed in the future?
4. Are there specific items or personal property you wish to give to certain people?
5. Do you wish to provide for any charities?
6. If no beneficiaries survive you, how would you like your estate distributed?

## Did You Know?

**Your will does not cover nonprobate assets, such as retirement funds. Make sure your retirement, life insurance, and other financial accounts (e.g., donor advised funds) are up to date with beneficiary designations. Make sure to inform all beneficiaries, including charities, about these intended gifts before your passing, as these pass outside of your probate estate. Notifying beneficiaries in advance can make the process of receiving the gift more straightforward for your loved ones or charities.**

## Who Gets What

### 1. Gifts to spouse/partner (we recommend indicating a contingent beneficiary as well)

Percentage of estate or description of asset

Name/relationship/address


### 2. To other beneficiaries

Percentage of estate or description of asset

Name/relationship/address


### 3. To charitable organizations

Name and address of charitable organization

Percentage of net estate

Dollar amount

	% or \$
	% or \$
	% or \$
	% or \$
	% or \$

Name and address of charitable organization

Description of asset




4. Balance or residue of estate

(where any leftover assets should be distributed, or where your estate should pass if none of your beneficiaries are living)

Name and address of charitable organization or other beneficiaries	Percent of residuary estate
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%

## Considering a Gift to the American Repertory Theater

From transformative productions to innovative education programs, the American Repertory Theater (A.R.T.) thrives thanks to the generosity of our community. Planned gifts of all sizes play a vital role in ensuring that the A.R.T. continues to expand the boundaries of theater for generations to come. By including A.R.T. in your estate plans, you can create a lasting legacy that supports groundbreaking performances, artistic development, and engagement with audiences of all ages.

You may give cash, marketable securities, or name the American Repertory Theater as a beneficiary of a financial account. If you are considering a bequest of tangible property or illiquid assets (e.g., real estate or artwork), we encourage you to contact our team to discuss your intentions. You can also use gifts from your estate to fund a life income gift or lead trust to provide for your spouse, children, or other beneficiaries while still supporting the A.R.T.

To learn more about planned giving options or to notify us of your intentions, please contact our Development team at [DonorEmails@AmRep.org](mailto:DonorEmails@AmRep.org). Sharing your plans allows us to ensure your gift is directed as you wish and gives us the opportunity to express our gratitude during your lifetime.

We have included information below for you and your attorney to ensure your gift is allocated correctly.



Justina Machado and Edward Padilla in *Real Women Have Curves*: Nile Scott Studios.

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### Sample Bequest Language

“I give (\_\_\_\_ percent of, \_\_\_\_ dollars from, or the remainder of my estate) to the American Repertory Theater, a nonprofit theater located in Cambridge, Massachusetts, for its general purposes (or specify: to support productions, education programs, artist development, etc.).”

By speaking with someone from our team, you can discuss how to direct your gift and the corresponding language to use to ensure you have the intended impact for years to come.

A.R.T.'s Tax ID/EIN is 04-2665867.

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### Helpful Tip

**If your will is already completed and you would like to make changes—including adding, removing, or revising a charitable gift—you may not need to redraft the entire document. Speak with your attorney about adding a codicil to reflect your intentions.**

NOTES

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