



The 5-Minute Control Plan

A Simple Checklist to Reduce the Fear of Losing Control

Purpose:

Taking control of your future does not require a complicated process. You can begin in just a few minutes by identifying the people and information that matter most. Use this checklist as a starting point.

1. Identify Your Trusted Decision Makers

If you could not make decisions for yourself, who would you trust to step in?

Financial decision maker (Power of Attorney):

Name: _____

Health care decision maker:

Name: _____

Backup person (if first choice cannot serve):

Name: _____

Phone number: _____

2. Confirm Your Key Legal Documents

Do you currently have the following documents?

- Durable Power of Attorney
- Health Care Power of Attorney
- Living Will / Advance Directive

- Last Will and Testament
- Revocable Living Trust (if applicable)

If you are unsure where these documents are located, note that here:

3. List Your Most Important Accounts

You do not need to list everything today. Start with the most important ones.

Bank: _____

Investment accounts: _____

Insurance policies: _____

Real estate or property: _____

4. Identify Important Contacts

These are the people your family may need to reach quickly.

Attorney: _____

Financial advisor: _____

Accountant: _____

Primary physician: _____

5. Start the Conversation

Consider speaking with the people you trust most about your plan.

Topics you may want to discuss:

- Who you want to make decisions if necessary
- Your wishes regarding medical care

- Where important documents are stored
- Your general financial organization

Even a short conversation today can prevent confusion later.

6. Schedule a Review

Estate planning documents should be reviewed periodically.

Consider reviewing your plan when:

- It has been more than 3–5 years
- A family member has passed away
- A marriage or divorce has occurred
- You move to another state
- Your health changes

Date of last review: _____

A Final Thought

The goal of planning is not to expect the worst. It is to ensure that if something happens, the people you trust will know exactly what to do. Taking even a few minutes today can bring clarity and peace of mind for the future.