



# My Plan

Scott Cary's Plan includes important information for all of life's details. You can view and update the most recent information at [getsnuug.com](https://getsnuug.com).

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1. **Personal:** Emergency contacts, personal history, benefits
2. **Legal:** Wills, trusts, powers of attorney, deeds, titles
3. **Medical:** History, allergies, current medications, care preferences
4. **Financial:** Bank accounts, investments, assets, debts, insurance
5. **Property:** Real estate, heirlooms, personal property
6. **Digital:** Photos, social media, subscriptions and memberships
7. **End of Life:** Words of wisdom, messages, funeral and burial

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# A complete guide to maintaining your plan.

Whether you're 18 or 80, you're taking an important step to protect your family and your legacy. That said, the planning you should do at 18 is very different from the planning you'll do at 80.

Let's look at the most impactful areas of planning, based on you and your life.

<b>Personal</b>	    	A list of emergency contacts, family members, and personal history are critical for everyone.
<b>Legal</b>	    	Whether a basic Will or an advanced Trust, everyone needs the foundational legal documents.
<b>Medical</b>	    	Clarity on your medical care preferences can save loved ones from making difficult decisions.
<b>Financial</b>	    	When you get married, your household finances require clear communication and sharing.
<b>Property</b>	    	With children, you can begin to shape your legacy with gifts and heirlooms for the next generation.
<b>Digital</b>	    	Retiring with a nest egg and a large digital footprint is a perfect time to get your digital house in order.
<b>End of Life</b>	    	How do you want to be remembered? Craft your legacy with stories, words of wisdom, and final arrangements.

## Getting started is easy.

1. Print these pages so that you and your advisor can take notes and set priorities
2. Complete each section on your account at [getsug.com](https://getsug.com)
3. Share your plan with family, friends, and advisors
4. Rinse and repeat by setting monthly, quarterly, or annual goals

# Personal

In the case of an emergency, I have included the contact information for family, close friends, and professional advisors. I've also included relevant details for personal history, including my education, employment, military service, and other group affiliations.

## Contacts

(NOTE: Include the most relevant contact information for each individual, as well as roles like power of attorney agents, health care proxies, neighbors with spare keys, etc.)

Name	Phone / Email	Notes
Craig Smith (friend)	3035889726	Craig is a good central point of contact for the larger friend group.
Jackie Cary (spouse)		
Laurel Cary (child)		Birthday: 2020-05-20
Calvin Cary (child)		Birthday: 2022-11-08
Holly Carter (parent)		
Jackie Cary (relative)		

## Advisors & Professionals

*(NOTE: Include the individual and firm details, as well as any contract or relationship history. Be sure to include financial advisors, accountants, attorneys, insurance brokers, etc.)*

Name	Phone / Email	Role / Notes
Craig Colquitt (Financial Advisor)	ian+xypn1a@getsnug.com	Generation Wealth Management

## Pets

*(NOTE: Include any specific details that a backup caretaker would find useful. For example, brand and type of food, medical history, current vet contact details, etc.)*

Name	Notes
Frisco (Goldendoodle)	Medical history and insurance on file at Wash Park Veterinary.

## Personal History

*(NOTE: Include the most important details that would impact financials and legacy. For example, pensions, military benefits, military medals, location of key documents, etc.)*

### Employment

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## Education

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## Military Service

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## Other History

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## Identification & Groups

*(NOTE: Include all relevant forms of identification, including military, SSN, driver's license, medicare, passport, religious/fraternal groups, etc..)*

Group	ID #	Notes

# Legal

I have included a catalog of relevant legal documents, across estate planning, marriage and divorce, taxes, and personal property. The original and signed copies of documents can be found in the locations given.

## Wills & Trusts

*(NOTE: You can view and maintain the latest Will and Trust documents on your account at [getsnug.com](https://getsnug.com).)*

### Key Details

#### Overview

The Cary Revocable Trust is a Joint Revocable Trust created in the state of Texas in August of 2020, with Scott Cary and Jackie Cary as initial grantors and co-trustees. The trust includes a Marital Trust (Trust A) for managing the estate after the first spouse's death and a Family Trust (Trust B) for dividing and managing the estate for their descendants.

#### Beneficiaries

##### **TODAY**

During your lifetimes, you are trustees of your trust and can change beneficiaries or other details as you please.

##### **FIRST DEATH**

After Spouse A dies, the trust property is split between a Marital Share and a Family (or non-marital) Share, referred to as "Trust A" and "Trust B" in your documents. Spouse B can disclaim any Marital Share assets. Spouse B has full access to income and principal for the Marital Share. Spouse B has access to income and principal for HEMS expenses for the Family Share.

##### **SECOND DEATH**

After both spouses die, the estate is split between your children, Alexandria Cary and Zachary Cary. Each child's share can be used for HEMS expenses and full access is given in quarters, with 25% at age 25, 25% at age 30, 25% at age 35, and the remainder at age 40.

In the rare chance that there are no living issue, the remote contingent beneficiaries are 33.5% to David & Beverly Cary, 33.5% to Patrick & Patricia Berkery, and 33% to a donor-advised fund charity.

Trustees	<p>During their lifetimes, Scott and Jackie will be the initial co-trustees of the trust, with each able to stay on individually and act as sole trustee. The following successor trustees are named in the Revocable Living Trust, to act successively in the order listed.</p> <ul style="list-style-type: none"> <li>- Scott &amp; Jackie Cary</li> <li>- George Cary</li> <li>- Robert Cary</li> </ul>
Child Guardians	<p>The following backup guardians are named in the Revocable Living Trust, to act successively in the order listed.</p> <ul style="list-style-type: none"> <li>- David &amp; Beverly Cary (or survivor)</li> <li>- Patrick &amp; Patricia Berkery (or survivor)</li> </ul>

## Power of Attorney

*(NOTE: You can view and maintain the latest Power of Attorney documents on your account at [getsnug.com](https://getsnug.com).)*

### Key Details

Overview	<p>This is the General Durable Power of Attorney for Scott Cary, created in the state of Texas in August of 2020. It includes power of attorney agents and grants all general powers. The power of attorney is set to be immediately effective and does not include any special instructions or exclusions.</p>
Agents	<p>The following agents are named in the General Power of Attorney, to act successively in the order listed.</p> <ul style="list-style-type: none"> <li>- Lucas Cary</li> <li>- Lauren Cary</li> <li>- John Cary</li> </ul>
Authority	<p>This power of attorney includes all general powers and does not include any special instructions or exclusions of powers/authority.</p>

## Health Care Directive

*(NOTE: You can view and maintain the latest Health Care Directive documents on your account at [getsnug.com](https://getsnug.com).)*

## Key Details

Overview	This is the Health Care Directive for Scott Cary, created in the state of Texas in August of 2020. It includes 3 key documents for medical care planning, including a Medical Power of Attorney, a Directive for Physicians, and a HIPAA Authorization/Release.
Agents	<p>The following agents are named in the Health Care Directive, to act successively in the order listed.</p> <ul style="list-style-type: none"><li>- Lucas Cary</li><li>- Lauren Cary</li><li>- John Cary</li></ul>
Living Will	This health care directive includes the option to select preferences/wishes for medical care, but these have not yet been filled in.

## Documents

*(NOTE: Include the location(s) of physical copies, as well as current status [e.g. signed, witnessed, notarized]. For example, tax returns, deeds, titles, marriage certificate.)*

Type	Notes / Location



Business

(NOTE: Include the name and type of business [e.g. LLC, corporation, sole proprietorship], ownership details, and any buy/sell agreement.)

Business Name	Type	Ownership / Notes
Acme Inc.	Corporation	50%

# Medical

If ever I'm in a situation where I'm unable to make or communicate medical decisions on my own, the following information should help. Where relevant, I've included details of any medical power of attorney and living wills / advance directives.

## Medical Contacts

*(NOTE: Include the individual and practice details, as well as any relevant history. Be sure to include your primary care physician, any specialists, and any medical agents/proxies.)*

Name	Phone / Email	Role / Notes
Lucas Cary	Sibling	
Lauren Cary	Sibling	
John Cary	Sibling	

## Current Medications

*(NOTE: Include the current dose, frequency, how long you've been on the medication, and reasons to be on the medication.)*

Name	Dose	Notes

**Name****Dose****Notes**

## Allergies

(NOTE: Include medical allergies, as well as any common daily allergies that might be relevant in a medical setting. Also include any relevant reversal medication.)

**Allergy****Notes**


## Medical History

(NOTE: Include surgeries, devices [e.g. pacemakers, implants, pins/screws, plates], and ongoing conditions [e.g. diabetes, high blood pressure].)

**Procedure / Condition****Date(s)****Notes**




## Debts

(NOTE: Include details on how you typically make payments, including the amount, frequency, and any online or app details. Also include the approximate balance for each. For example, mortgages, student or personal loans, or HELOC.)

Debt Type	Lender	Notes
Mortgage	Freedom Financial	3.5% interest rate. Broker contact is John Smith 505-234-2342
Student Loan	Federal Loan	Currently on forbearance.

## Credit Cards

(NOTE: Include any credit cards that you use regularly, with details on how you pay [e.g. online or via mailed statement] and any instructions [e.g. "only pay the minimum due"].)

Credit Card	Account Number	Notes

## Insurance

(NOTE: Include details on how you pay premiums and any special instructions. Include notes on beneficiary designations and coverage for any life insurance policies. For example, Life, Health, Long-term Care, Auto, Umbrella, or Home insurance.)

[illegible]

# Property

I understand that there are many operational and logistical details in life that can be difficult to unwind without guidance. Below, I have included details for real estate, personal property, physical storage, and utilities.

## Real Estate

*(NOTE: Include details for any primary residence, secondary/vacation property, investment properties, and land.)*

Type	Address	Notes
Primary Residence	800 Marion Street, Denver, CO	Beneficiary deed filed, jointly held between Jackie and Scott. Mortgage broker is John Smith (555) 222-3425 and realtor is Jane Smith (555) 234-2343.
Investment	1644 Platte Street, Denver CO	I wish this to be sold and have the cash distributed per my wishes in the estate.

## Tangible Personal Property

*(NOTE: Include a list of important personal property, especially heirloom items that you would want to give to family, friends, or charity.)*

Description	Recipient / Notes

[illegible]

(OPTIONAL: Sign and date below to formalize your list of personal property and beneficiaries/recipients. This can be a flexible way to maintain a list of heirlooms and tangible gifts for family, friends, and charity.)

I hereby make this separate written memorandum of disposition of tangible personal property according to the terms of my Last Will and Testament, to give, devise and bequeath the following tangible personal property to the beneficiaries named below upon my death. Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

## Physical Storage

(NOTE: Includes details on storage units, safe deposit boxes, and personal safes. Be sure to include notes on the location, contents, and access codes or combinations.)

Type	Location	Notes
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**Type****Location****Notes**

## Utilities

*(NOTE: Include special instructions for a power of attorney agent, executor, or trustee who is responsible for maintaining your home or other real estate. For example, electric, gas / oil, internet / telecom, cable / satellite, or trash / recycling.)*

**Type****Company****Notes**

# Digital

I have a digital footprint today that will become part of my legacy and estate settlement tasks after I die. I have included the details my family and loved ones will need, including social media accounts, digital photo albums and other assets, subscriptions and memberships, and the location of key passwords and passcodes.

## Social Media

*(NOTE: Include preferences for your account after death [e.g. close vs. memorialize your Facebook account] and the location of any passwords.)*

Account	Notes
Instagram	Username: supremescott Delete this account
Facebook	Username: scott@getsnug.com Memorialize this account.

## Digital Assets

*(NOTE: Include online photo albums, mileage/loyalty programs, cloud storage, bitcoin and other crypto holdings, and any other digital assets.)*

Asset	Notes
Rewards - United MileagePlus	Username: Setup Jackie as backup user for this account.
Crypto - Coinbase	Username: scott@getsnug.com
Photos - Apple Photos	Username: scott@getsnug.com

**Asset****Notes**

## Subscriptions & Memberships

*(NOTE: Include relevant passwords and preferences for each account. Be sure to include streaming services [e.g. Netflix, Disney+] and subscriptions for news, reading, music, etc.)*

**Subscription / Membership****Notes**

Spotify

Username: cary01234  
Family plan is shared with mom, dad, and brother/sister in law. Transition the account to Ben.

Lifetime Fitness

Username:  
Annual membership renews in September each year.

## Passwords & Passcodes

*(NOTE: Your passwords and passcodes should be stored in a secure location. Be sure to consider both hardware [e.g. phone, computer] and software services).*

Account / Device	Password Location / Notes

# End of Life

In order to help define my legacy and ease the future burden on my family and loved ones, I have included my perspective and preferences for end of life planning. This includes my final arrangements, family history for an obituary or eulogy, and words of wisdom.

## Final Arrangements

*(NOTE: Several topics have been seeded below for consideration in gathering your final arrangements. Feel free to expand on this initial list.)*

Topic	Notes / Preferences
Cremation vs. Burial	
Cemetery Plot / Final Resting Place	
Funeral Home	
Music / Poetry	
Pallbearers	
Tombstone Engraving	
Preferred Charity for Donation	
Minister / Rabbi / Clergy person	
Organs for Donation	

## Family History

*(NOTE: Include details that would help give an overview of your life, to be used in either an obituary or eulogy after death.)*

Topic	Notes
Birth Date & Location	
Spouse/Partner	
Children	
Parents	
Siblings	
Maternal Grandparents	
Paternal Grandparents	

## Words of Wisdom

*(NOTE: Include life lessons, advice, and other details that you want to pass on to your family and future generations.)*

**I hope my family will learn from my experiences...**

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**I believe the most important things in life are...**

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**The most important thing I've done with my life is...**

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**It is my hope that my family will use its inheritance to...**

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**How I would like to be remembered...**

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