

Estate Planning

Names and Addresses

Name(s): _____ Date of Birth: _____
Date of Birth: _____
Mailing Address: _____
Telephone Nos: (Work) _____ (Home) _____ (Mobile) _____
E-Mail Address: _____

Estate Plan

Do you have an existing Will(s)? Yes No If yes, provide your attorney with a copy.

Family Information

Marital Status:

- Married
 Unmarried, Widow or Widower
 Unmarried, Divorced
 Married Person Establishing Separate Trust

Children:

Name	Date of Birth or from a Previous Marriage	Indicate Whether Adopted or from a Previous Marriage
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-----	-----	-----
-----	-----	-----
-----	-----	-----

Any deceased children? Yes No

If Yes, Name of Deceased Child:

Did this deceased child leave any children? Yes No

Name of Deceased Child:

Did this deceased child leave any children? Yes No

Have any children received an advance on their inheritance or are any children financially indebted to you? Yes No

Is there any reason to treat your children other than equally?

Are any of the children financially irresponsible? Yes No

Are any of the children under a disability? Yes No

Have you been married previously? Yes No

If any child should predecease a parent, should his/her share pass through to his/her children? Yes No

If Yes to the above, please indicate grandchildren, if any:

Name: _____ Date of Birth: _____

Parents: _____

In the event of your death, who should be guardian of your minor children? (A guardian has hysical and legal control over your children until they reach the age of eighteen.)

First choice: Name(s):

Address:

Relationship (if any):

Second choice: Name(s):

Address:

Relationship (if any):

Other Pertinent Family Information or Explanation of Above Items:

Personal Representative

who should be the Personal Representative ("Executor") of your estate? (A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.)

First choice: (Spouse is normally used first):

Alternate Name:

Address:

Second Alternate Name:

Address:

Specific Requests

Do you wish to make a reference in your will to a separate list of any specific bequests of items of personal property that you wish to give to your children or others? The advantage of such a list is that it may be changed without changing your will.

Yes No

Do you wish to make any charitable bequests? Yes No

Do you have a safe deposit box? If so, where?

Does anyone else have access to your box?

Other Estate Planning Tools

Are you interested in preparing a Power of Attorney granting another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name?

Yes No

Are you interested in preparing a Health Care Declaration ("Living Will") stating your preference for health care if you are in a terminal condition?

Yes No

If you are executing a Living Will or Health Care Declaration, please give your primary physician's name and address:

Do you have any special requests regarding funeral or burial instructions or organ donation? If so, this is best handled by a Letter of Instruction or other statement from your will to your family or other responsible person.

Yes No

Do you have a financial planner, investment advisor, or insurance agent?

Yes No

Information Regarding Assets

Married Couples:

- _____ ("Spouse 1") has separate assets.
 _____ ("Spouse 2") has separate assets.
 All assets are held jointly

1. Estimated net worth of estate: \$ _____

2. Cash or cash equivalent accounts held at financial institutions:

Checking and savings accounts, or certificates of deposit, with banks, savings and loans, or credit unions.

How many different financial institutions? _____

3. Investments (check all that apply):

Cash or money fund accounts, or certificates of deposit with stock broker firms.

How many different broker firms? _____

Stocks, bonds, and mutual funds where your broker holds the certificates and sends you periodic statements showing your account balance.

How many different stock brokerage firms? _____

Mutual funds where you deal directly with the issuing company rather than through your stock broker. How many different mutual fund companies? _____

Stocks and bonds (other than U.S. Savings Bonds) where you hold the certificates in your possession. How many different companies/ issuers? _____

U.S. Savings Bonds.

Treasury bills or other government securities.

Limited partnerships. How many limited partnerships? _____

Oil and gas royalty or working interests. How many? _____

Oil and gas mineral rights in land. How many parcels of land? _____

Other securities [describe] _____

4. Retirement plans:

Individual retirement accounts (IRAs), Keogh, or other individual plans providing tax deferment for deposits and income. How many different financial institutions hold IRA accounts for: Spouse 1 _____ Spouse 2 _____

Employer provided profit sharing, retirement, or other benefit plans:

How many different plans for: Spouse 1 _____ Spouse 2 _____

5. Complete this section if you own real estate.

Personal residence located in state of _____

Other property. How many different parcels of real estate do you own, other than your personal residence? _____

In what state(s) are these parcels located? _____

Are you purchasing any of the above properties on a contract for deed?

Yes No. If Yes, provide details: _____

6. Complete this section if you are engaged in business.

Do you own a business, or are you a partner in a business? Yes No

If Yes, complete the following:

Business is organized as a corporation. How many corporations? _____

How many corporations are subchapter S corporations? _____

Business is organized as a partnership. How many partnerships? _____

Business is a sole proprietorship. How many different firms? _____

7. Receivables: If any money is owed to you, as payments on contracts, where you have sold a business, as payments on obligations secured by real estate, or where you have loaned money to someone and you hold a note, indicate each type of indebtedness that you hold.

Promissory note(s) secured by real estate. Amount(s) owed: _____

Installment contract(s) of sale of personal property.

Amount(s) owed: _____

Unsecured promissory note(s). Amount(s) owed: _____

8. Life Insurance Policies: Please indicate the name of the person insured, the name of the insurance company, the face amount of the policy, and the type of policy.

Name of Insured	Insurance Company	Face Amount	Type of Policy
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-----	-----	-----	-----
-----	-----	-----	-----
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9. Annuities: Please indicate the name of the annuitant and the type of annuity. Do not list annuities under which no benefits are payable

Regular annuities payable for guaranteed minimum term or amount:

Tax deferred annuities: _____

10. Personal property other than automobiles, trucks, boats, and trailers:

Household furniture and appliances

Collections, art, antiques, valuable jewelry

Automobiles

Boats

Recreational vehicles

Motor home

Business machinery and equipment

Personal equipment and tools

Farm or ranch machinery and equipment (other than general household tools)

Livestock

QUESTIONS

(Make a list of pertinent questions to ask your attorney)