



**Deceased Children** (if any and his/her children)

[Redacted]

**Living Parents**

	Husband	Wife
<u>Name</u>	[Redacted]	[Redacted]
<u>Address</u>	[Redacted]	[Redacted]
	[Redacted]	[Redacted]

**Living Siblings**

Husband	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]
Wife	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]

Are there any persons not named above to whom you would like to make distributions under your estate planning documents? (such as nieces or nephews, friends, charities)

<u>Name</u>	<u>Address</u>	<u>Relationship</u>	<u>DOB (if minor)</u>
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

**Do you have long term care insurance?** [Redacted]

**Do either of you have disability insurance?** [Redacted]

If so, what is the value (i.e. 60% or 80% of salary): [Redacted]

**Do either of you:**

	Yes	No
Expect to receive gifts or inheritance from others? Approximate value: [Redacted]	<input type="checkbox"/>	<input type="checkbox"/>
Expect to receive benefits from a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Have powers of appointment?	<input type="checkbox"/>	<input type="checkbox"/>
Have beneficial interests in trusts?	<input type="checkbox"/>	<input type="checkbox"/>
Have an interest in a Buy-Sell Agreement?	<input type="checkbox"/>	<input type="checkbox"/>

## Asset Information

**Annual Income:** Husband

Wife

**Asset Holdings:** (Indicate values or estimates)

	Husband	Joint	Wife
Retirement Plan Assets:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Accounts:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Checking Accounts:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings & Investments:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Real Estate:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Entities:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Property: (boats, cars, etc)	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debts:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Life Insurance:

Company:	Death Benefit:	Cash Value:	Person Insured:	Owner:	Beneficiary:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## **Provisions Desired By Client**

### **Disposition of Assets:**

Most married people want the bulk of their property to pass to their surviving spouse outright or in trust for the survivor's benefit with the balance to pass to their mutual children upon the second death. Assets may pass to adult children outright or each child's share may be held in a separate trust to help ensure the responsible use of trust assets, protect the assets from the child's creditors (including estranged spouses), and keep the assets in the family bloodlines upon the child's death. You may want to permit the child to become the trustee of his or her own trust at a certain age (i.e.30 or 35). [Of course, all of this must be carefully customized for you and will be discussed when we meet, but these suggestions may be helpful.]

- a.  Check here if you want assets to stay in a separate trust for each child with each child becoming the trustee of his or her trust at age 30 or 35. [See above for explanation of the same.] Indicate any desired modifications:

- b.  As an alternative, check here if you want the assets to pass outright to children upon the second of you and your spouse to pass.

### **Family Tragedy:**

If spouse and all of your descendants predecease you, how are assets to be distributed? (i.e. equally to siblings and/or parents, to friends, to charity or otherwise):

- c. If the above suggestions do not apply, indicate below how your assets are to be distributed:

**Personal Representative/Executor:**

This is the person who will carry out your wishes under your last will and testament and administer your estate. It is typically an adult child, sibling or trusted friend and should be a person who you trust, has sound judgment and is capable of handling at least basic financial matters. (Indicate Name, Address, and Relation)

	Husband	Wife
Initial Personal Representative:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
1st Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
2nd Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

**Guardians for Minor Children (if any):**

Until minor children reach the age of 18, they must have a guardian appointed with respect to both their person and any property if both parents predecease them. The selected guardian is usually a related couple but can be any adult who you believe will care for your children in a loving and responsible manner. If you have minor children, please indicate your selected guardian(s) and successors.

1st Guardian:

2nd Guardian:

Check here if you would like the Guardians to also serve as the trustees of any trusts established for the benefit of your children. If not, the trustees named below in item 4 would serve.

## **Trustee for Will or Revocable Trust**

You will typically serve as the initial Trustee of your revocable trust either alone or with your spouse. You will need to name a successor trustee who will handle your trust assets upon incapacity and carry out your desired distribution plan upon death. (Please note that the successor trustee handles assets that are titled in your revocable trust and the attorney-in-fact and personal representative handle assets that are not in your trust.) Again, this is typically a surviving spouse, adult child or trust company and should be a person or trust company.

Note: We assume that you will be the initial trustee of your own revocable trust.

(Indicate Name, Address, and Phone Numbers)

	Husband	Wife
1st Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
2nd Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
3rd Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

## **Power of Attorney**

The attorney-in-fact named under your power of attorney will be given the authority to access and use your assets that are outside of your revocable trust in your best interest in the event you are incapacitated. Again, this is typically a surviving spouse, adult child or trusted friend and should be a person who you trust, has sound judgment and is capable of handling at least basic financial matters.

(Indicate Name, Address, and Phone Numbers)

	Husband	Wife
Initial:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
1st Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
2nd Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

## **Health Care Directive**

Your named healthcare agent under your advanced healthcare directive will be given the right to make decisions for you with respect to your health care in the event you are incapacitated. Typically it is a spouse then an adult child or trusted friend who loves and cares for you.

(Indicate Name, Address, and Phone Number)

	Husband	Wife
Initial Agent:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
1st Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
2nd Substitute:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

## **Disposition of Remains**

Please specify desires relating to burial or cremation, location of remains, type of memorial service or the like:

## **Personal Advisors**

	Name	Address	Phone Number
Accountant:	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	
Financial Advisor:	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	
Life Insurance Agent:	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	
Personal Attorney:	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	