

ESTATE PLANNING INFORMATION

Full Name: _____ Social Security #: _____

Phone #: _____ Date of Birth: _____

Address: _____

Children's Names: _____

Who do you want to receive your estate at your death and in what percentages? _____

If one of the above named individuals predeceases you, should their share be distributed to their children or to the other named beneficiaries? _____

Should each beneficiary receive their bequest outright or should any beneficiary receive their share in trust to be distributed in the discretion of the trustee? If a trust is preferable, who would you want to serve as a trustee? Alternate trustee? At what age would you want your children to receive an outright distribution of the trust assets? Often, we use the one-third at 25, 30, and 35. _____

Who do you want to serve as Executor? The Executor will pay your final bills and distribute your assets pursuant the terms of your will. Who would you name as an alternate Executor? _____

Who would you appoint to pay your bills and handle your financial affairs if you were incapacitated? If the first person you name is unable to serve, who would you want to serve as an alternate? Please provide an address and phone number for those individuals.

Name: _____
Address: _____
County: _____
Phone #: _____

Name: _____
Address: _____
County: _____
Phone #: _____

Who would you appoint to make health care decisions for you if you were incapacitated? If the first person you name is unable to serve, who would you want to serve as an alternate? Please provide an address and phone number for those individuals.

Name: _____
Address: _____
County: _____
Phone #: _____

Name: _____
Address: _____
County: _____
Phone #: _____

Do you want a living will? A living will provides that if you are on life support and you are terminal, you direct that the life support should be disconnected. _____

Do you have specific assets that you would want to be distributed to certain people? If so, we can list the specific bequests in the will or we can specify that you will leave a memo listing certain assets that you want to be distributed to certain people. _____

Who should serve as a guardian of any minor children? Alternate? _____

