



Estate Planning Worksheet

(please complete and bring worksheet to your scheduled appointment)

INFORMATION ABOUT YOU AND YOUR FAMILY

You

Full Name: _____ Middle Initial: _____

County: _____

Address: _____

City: _____ State: _____ Zip: _____

Age: _____ Date of Birth: _____ Social Security Number: _____

Telephone: Home- _____ Cell: _____

Work- _____

E-mail: _____

Spouse

Full Name: _____ Middle Initial: _____

Age: _____ Date of Birth: _____ Social Security Number: _____

Address (if different): _____

Telephone: Home- _____ Cell- _____

Work- _____

E-mail: _____

Children

(If a blended family, indicate who the child's parent is: **You**, **Spouse**, **Both**)

Name	Address	Phone Number	Age
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please answer the following questions. We will use your answers in developing our Recommendations for your estate plan.

1. Are you a U.S. citizen? ____ If you are married, is your spouse a U.S. citizen? _____
2. Do you have any children who are under age 18? _____
3. Do you or your spouse have any children (minor or adult) who qualify for needs-based government assistance (i.e., Medicaid)? _____
4. Are you or your spouse currently receiving any needs-based government assistance (i.e., Medicaid)? _____
5. Do you wish to avoid your estate going through probate? _____
6. If you have minor children, at what age do you wish to have them inherit your estate? _____
7. If you have minor children, do you wish to encourage them to go to college/trade/technical school? _____
8. If you are married and have a blended family, do you and your spouse wish to have all or part of your estates go to your respective children rather than the spouse? _____
9. Do you have any pets? ____ Are you interested in learning how you can provide for you pets when you are gone? _____
10. Do you have any social media accounts, including but not limited to a PayPal Account, Facebook, MySpace, Twitter, and/or Photo Sharing? If so, please make a list of all of the electronic accounts you have. Also, list all of your passwords in one place, and be sure to provide us with a copy of that list at our initial meeting. You will want to decide who should have access to these accounts once you have passed away. Make sure that this person (or persons) knows where your list is. Please state the name(s), phone numbers(s), and address(es) of those persons so that we can include that in your estate plan. _____

Current Estate Plan

- 11. Do you and/or your spouse have a Will? _____
- 12. Do you and/or your spouse have a Trust? _____
- 13. Do you and/or your spouse have a Health Care Power of Attorney? _____
- 14. Do you and/or your spouse have a Power of Attorney for your property? _____
- 15. Do you and/or your spouse have a Power of Appointment? _____
- 16. If married, do you and your spouse have a Prenuptial or Antenuptial Agreement? _____

INFORMATION ABOUT YOUR PROPERTY

(Enter the approximate current market value of your assets)

Who Owns the Asset?	You	Spouse	Joint
Total value of home and other real estate			
Value of total investments (stocks, bonds)			
Value of profit sharing, IRAs, pension & 401K			
Value of a business			
Value of bank accounts (checking, savings)			
Total value of cars, boats & motor homes			
Value of personal property & collectibles			
Total amount of money that people owe you			
Amount life insurance will pay at your death			
Other			
TOTALS			

NOTE: THE INFORMATION REQUESTED IN THE FOLLOWING SECTION OF THIS WORKBOOK WOULD BE USED IN PREPARING YOUR ESTATE PLAN DOCUMENTS.

IT WILL BE HELPFUL IF YOU ARE ABLE TO COMPLETE SOME OR ALL OF THIS INFORMATION. ANY MISSING INFORMATION WILL BE DISCUSSED WITH YOU SHOULD YOU DECIDE TO HAVE US PREPARE AN ESTATE PLAN FOR YOU.

PLAN OF DISTRIBUTION

Specific Gifts

Do you want to make charitable gifts, such as to a church or charity? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?

Residue

Who is to receive assets that are remaining after any specific gifts are distributed?

___ all to spouse; If no spouse then:

___ equally divided between surviving children.

___ then equally divided between children, with any deceased child's share equally divided between his/her descendants by right of representation.

___ then equally divided between children, with any deceased child's share equally divided between his/her children and maintained in trust until the grandchild reaches the Distribution Age. Trustee shall pay to or for the benefit of the grandchild those portions of Interest and principal that Trustee determines necessary for the reasonable health care, education, support and maintenance of the grandchild. The share of any grandchild who does not survive, or does not survive until Distribution Age, shall be equally divided between his/her descendants by right or representation, and maintained in trust for each descendant under the same terms as for a grandchild until the descendant attains the Distribution Age, or if no descendants, then equally to his/her siblings and maintained in trust as provided herein, or if no siblings, then to my/our other children as provided herein. Distribution Age: _____

____ then equally divided between children, and maintained in trust until the child reaches the Distribution Age. The Trustee shall pay to or for the benefit of the child those portions of interest and principal that Trustee determines necessary for the reasonable health care, education, support and maintenance of the child. The share of any child who does not survive, or does not survive until Distribution Age, shall be equally divided between his/her descendants by right or representation, and maintained in trust each descendant under the same terms as for a child until the descendant attains the Distribution Age, or if no descendants, then equally to other children and maintenance in trust as provided herein. Distribution Age: _____

____ then maintained in the trust for the benefit of all children until the youngest child attains the Distribution Age. Trustee shall pay to or for the benefit of the children those portions of interest and principal that Trustee determines necessary for the reasonable health care, education, support and maintenance of the children. Trust shall continue until youngest child attains the Distribution Age, at which time the Trustee shall divide the residue of the Trust equally between then surviving children, provided the Trustee may adjust such shares as necessary to equitably take account of substantially disproportionate expenditure of Trust funds for a benefit of a child (education, travel, social expenses and the like). The share of any child who does not survive, or does not survive until Distribution Age, shall be equally divided between his/her descendants by right of representation, and maintained in trust for each descendant under the same terms as for a child until the descendant attains the Distribution Age, or if no descendants, then equally to other children and maintained in trust as provided herein.
Distribution Age: _____

Other: _____

Ultimate Distribution

Who is to receive your property if neither you, your spouse, your children or other descendants survive?

Distribution Age

If you do establish a Trust to manage assets for beneficiaries, then you need to decide when the remaining balance in the Trust is to be distributed outright to the beneficiary. You might want to give each beneficiary his/her share when the beneficiary reaches a certain age, or upon the occurrence of a particular event (such as obtaining a college degree). You might consider splitting the distribution, such as ½ at age 25 and the balance at age 30. _____

ESTATE PLAN INFORMATION

Durable Power of Attorney

This document lets you choose the person or corporate entity who will manage any property you own if you become incapacitated. You should also name an alternate Agent in case the individual or corporate entity you name is unable to serve.

(Unless you decide otherwise, for married individuals each spouse will be named the first Agent for the other, and your choices below will be for the 1st Alternate Agent and 2nd Alternate Agent)

Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Spouse's Durable Power of Attorney

Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Power of Attorney for Health Care

This document lets you choose the person who will make health care decisions (including decisions about life support) for you if you are unable to make them for yourself. You should also name an alternate Agent in case the person you name is unable to serve.

(Unless you decide otherwise, for married individuals each spouse will be named the Agent for the other, and your choices below will be for the 1st Alternate Agent and 2nd Alternate Agent)

Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Spouse's Power of Attorney for Health Care

Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Personal Representative

Your Personal Representative (Executor in some states) is the person or corporate entity who will be responsible for managing any probate of your estate. You should also name an alternate Personal Representative in case the person or corporate entity you name is unable to serve.

(Unless you decide otherwise, for married individuals each spouse will be named the Personal Representative for the other, and your choices below will be for the 1st Alternate Personal Representative and 2nd Alternate Personal Representative)

Personal Representative: _____

Address: _____

Phone: _____

Alternate Representative: _____

Address: _____

Phone: _____

Trustee

If you decide to have a Living Trust Estate Plan, you will need to name the person or corporate entity who manages your Trust after your death or upon your disability. You will be the initial Trustee.

(Unless you decide otherwise, for married individuals each spouse will be named the Successor Trustee for the other, and your choices below will be for the 1st Alternate Successor Trustee and 2nd Alternate Successor Trustee)

Successor Trustee: _____

Address: _____

Phone: _____

Alternate Successor Trustee: _____

Address: _____

Phone: _____

Guardian

If you have minor children, who will raise them if something happens to you? You can name either an individual or a married couple who will serve as joint Guardians. You should also name an alternate Guardian in case the individual or individuals you name are unable to serve. Do not complete if you do not have minor children.

Guardian: _____

Address: _____

Phone: _____

Alternate Guardian: _____

Address: _____

Phone: _____

Conservator

If you have minor children, who will manage property your minor children receive until they become adults (age 18 in most states). You should also name an alternate Conservator in case the individual or corporate entity you name is unable to serve. Do not complete if you do not have minor children.

Conservator: _____

Address: _____

Phone: _____

Alternate Conservator: _____

Address: _____

Phone: _____