

How soon would you like to complete planning? Is there a specific deadline, such as an upcoming trip, surgery, etc.? _____

Do you presently have a will? Yes No

Do you presently have a trust (either revocable or irrevocable)? Yes No

Are you interested in avoiding probate of your estate? Yes No

Were there any previous marriages? Yes No
If yes, year marriage ended in: _____

Do you have any relatives (other than children) who depend on you for all or part of their support? Yes No

Do any of your children or other beneficiaries have disabilities? Yes No

Do you wish to disinherit any of your children, grandchildren or any other close relative? Yes No

Do you want assets passing to your beneficiaries to be held in trust until a specific age or ages? Yes No

Do you expect to inherit substantial assets (\$100,000 +)? Yes No

Do you own a farm or business? Yes No

If yes, do any of your children work in the business with you? Yes No

If yes, does the child working in the business have an ownership interest in the business? Yes No

Have you ever filed a Federal Gift Tax Return? Yes No

Do you have an existing General Power of Attorney? Yes No

Do you currently hold any assets in Joint Tenancy with another person? Yes No

Do you wish to make anatomical bequests (organ donor)? Yes No

Are you a U.S. citizen? Yes No

Do you or any family member or potential beneficiaries have any serious health problems? Yes No

If yes, please describe briefly: _____

Net Worth: If you added the value of all property you own including real estate, personal property, bank accounts, stocks, bonds, IRAs, and anything else you own except death benefits on life insurance, what is the approximate total value of your estate? _____

What is the value of death benefits on life insurance insuring you? _____

What is the total amount of your outstanding liabilities? _____

Children or Other Beneficiaries

Name	Address	Date of Birth	Relationship

Number of grandchildren: _____ Range of Ages: _____

Do you have any deceased children? Yes No

If yes, name(s): _____

If yes, survived by issue?

If yes, name(s): _____

Do you have any adopted children? Yes No

If yes, name(s): _____

Appointments

1. **Personal Representative.** The will should name a personal representative to probate the estate. (Personal representative is also sometimes referred to as executor or administrator.)

Personal Representative: _____

Alternate: _____

Second Alternate: _____

2. **Successor Trustee.** If you choose to avoid probate of your estate by executing a living trust during your lifetime, a successor trustee should be named. The successor trustee would be responsible for managing assets if you were unable to do so. The successor trustee would manage assets in the event of your incapacity and would distribute assets to beneficiaries after death.

Successor Trustee: _____

Alternate: _____

Second Alternate: _____

3. **Health Care Agent.** Who should be named to make medical decisions on your behalf including decisions regarding medical consents, life support issues, and nursing home admission if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent.

Health Care Agent: _____

Alternate: _____

Second Alternate: _____

4. **Durable Power of Attorney.** Who should be named to make financial decisions on your behalf including decisions regarding banking, check writing, and transfers of assets if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee/personal representative or your health care agent as your agent under the power of attorney.

Agent: _____

Alternate: _____

Second Alternate: _____

Plan of Distribution

1. **Specific Gifts.** Do you want to make charitable gifts, such as to a house of worship or other institution? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?

2. Briefly describe where you would want assets remaining after any specific gifts are distributed. (Don't worry about tax planning or other considerations in answering this question. We'll consider those details later if needed.)

- Equally between children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.
- Equally between surviving children
- As follows: _____

3. **Ultimate Distribution.** You might want to provide for the distribution of your property if neither you, nor your children/other beneficiaries named above survive.

Please complete this section only if you have minor beneficiaries or beneficiaries with disabilities.

1. **Guardian.** If you have minor children or a beneficiary with special needs, you may need to appoint a guardian. The guardian is responsible for the day-to-day care of the child. It is a good idea to name an alternate guardian to act if your first choice cannot serve.

Guardian: _____

Alternate: _____

2. **Testamentary Trustee.** You may need a trustee to manage assets for beneficiaries until they reach an age when you believe they should be capable of managing assets on their own. A trustee can keep the beneficiary's money invested wisely and use it for their education, support,

Income/Asset/Liability Information

Please list your income/asset/liability information in the appropriate category below.
Attach a separate page if necessary.

Income:

Earned Monthly Income from Labor _____

Monthly Social Security Income _____

Monthly Pension Income _____

Other Monthly Income _____

Type of Asset	Title in Which Held (You solely, Joint with third party, Tenants in common, etc.)	Current Value
Real Estate (Include type of property e.g., residential, agricultural, commercial, or manufacturing.)		
Personal Residence		
Vacant Land		
Other:		
Liquid Assets		
Cash on Hand		
Government and Publicly Traded Securities		
Unlisted Securities (Not Publicly Traded)		
Money Market Accounts		
Equity in Business Sole Prop. Partnership		
Notes and Loans Receivable		

Type of Asset	Title in Which Held (You solely, Joint with third party, Tenants in common, etc.)		Current Value	
Checking Accounts				
Savings Account				
Certificates of Deposit				
Automobiles				
Other Personal Property				
Annuities	Owner	Beneficiary	Current Value	
IRAs				
Pension/Profit Sharing				
Life Insurance			Cash Value	Death Benefit
Other Assets				
Liabilities	Name Loan Taken In		Amount Owed	