



Estate Planning Informational Sheet

Name(s) (full legal):

Address:

County where Reside:

Phone:

E-mail:

Children: Full names and ages of all children (including those adopted, and born outside of the marriage)

Marital Status:

Prior Marriage? YES NO

Preuptial Agreement? YES NO

Assets:

Real Estate: Real Estate owned, regardless of encumbrances; how title is held.

Personal Property: that you want to specifically gift to an individual(s) (Jewelry, china, art work, autos, boats, airplanes, etc.)

Insurance Policies: Face value of policy, owner, beneficiary, type of policy.

Retirement Accounts, IRAs, Annuities, Qualified Plan Benefits: face value, beneficiary, type of account.

Checking Accounts, Savings Accounts, CDs: face value, name on account, jointly or individually held, banking institution.

Stocks, Bonds, Securities: face value, owner, type.

Additional assets not mentioned above: face value, name, owner, beneficiary, how titled, etc.

Expected Family or Personal Future Inheritance that we should be aware of?

Family and Will Specifics

Children: Full legal name(s) and birth dates; addresses if emancipated.

Guardian and Contingent Guardian (if still minors): Full names (with middle initial) and addresses.

Executor and Contingent Executor(s) (for the will): Full Names (middle initials, addresses, and phone numbers.

Surety- to be waived on bond of Guardian? _____ Executor? _____

PRIMARY DISTRIBUTION:

(only if different than: all to surviving spouse, and then to children)

TRUST Arrangements, if any:

- If we were to do a trust, what kind of distribution scheme would you like to see?

POA Property (need info for Both Husband and Wife):

- Primary Agent full name; address; and phone number (person giving the power to)(only list if other than Spouse):

- Successor Agents – full name; address; and phone number: (can appoint up to 2 if something happens to first, etc.):
 - a)

 - b)

POA Healthcare:

- Agent full name; address; and phone number (person giving the power to)(only list if other than Spouse):

- Successor Agents – full name; address; and phone number: (can appoint up to 2 if something happens to first, etc.):
 - a)

 - b)