

ESTATE PLANNING WORKSHEET

Wills & Estate Planning

Information requested and/or things to consider for the drafting of your
Last Will & Testament

LEGAL NAME _____ Date of Conference _____

ADDRESS _____

ZIP CODE _____

TOWNSHIP _____

COUNTY _____

Please indicate information re Living Will Declaration and Health Care Proxy - note
that there is a worksheet on the Health Care Proxy Page of this website.

PHONE NUMBERS _____

E-MAIL _____

NAMES AND AGES OF CHILDREN

SPECIFIC BEQUESTS

TRUST ARRANGEMENT _____

GUARDIAN OF PERSON, ADDRESS AND TELE #

ALTERNATE _____

EXECUTOR OR EXECUTRIX, ADDRESS AND TELE #

ALTERNATE EXECUTOR/TRIX

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TRUSTEE, ADDRESS AND TELE #

ALTERNATE TRUSTEE

Estate Planning and the drafting of your Last Will and Testament are thoughtful and necessary for the benefit of you, your family and the preservation and distribution of your assets. Kindly note the worksheets available that will assist you in organizing your thoughts and wishes as well as your assets and obligations. Please feel free to print the worksheets provided and make notes relative to questions you may have which will help make your initial consultation more productive. I recommend the drafting of these important documents be accomplished by an attorney to help insure accuracy and that they are reflective of your wishes and directives.

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Information provided is held in complete confidence, and is used for the sole purpose of analyzing estate planning needs and designing estate planning documents. Preparation of this worksheet is not mandatory prior to the initial appointment with us, but if we are able to review the completed worksheet prior to or at your first appointment, more can be accomplished during the appointment.

The information requested on this worksheet may seem like none of an attorney's business, but it is very important that an estate planning attorney understands your present situation and your wishes for the future. This information enables us to plan the estate to accomplish future goals and to take steps to save on taxes and administrative expenses.

If you are married and all information on this worksheet is identical for you and your spouse, fill out one worksheet only. If information for each spouse differs, please download multiple copies of this worksheet so each spouse has one to fill out.

For those of you who are single, please note that phrasing everything based on husband and wife is for the simplicity of the form only. Estate planning is very important for singles as well as couples. Plans of distribution for singles is not obvious and most or all assets will be probated unless held in joint tenancy.

Date: _____

Phone Number: _____

For Husband:

Name (first, middle initial, last): _____

Date of Birth: _____ Social Security #: _____

For Wife:

Name (first, middle initial, last): _____

Date of Birth: _____ Social Security #: _____

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Address: _____
County: _____ State: _____

Marital Status: Married Divorced
 Separated Single (including widowed and not remarried)

What is your primary motivation for considering estate planning? (select all that apply)

- Probate Avoidance Federal Estate Tax Planning (for estate over \$650,000)
 Business or Farm Planning Guardianship for Minor Children
 Other: _____

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

Husband

Wife

Do you presently have a will? Yes No

Yes No

Do you presently have a trust? Yes No

Yes No

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

Yes No

Were there any previous marriages? Yes No

Yes No

Are any of your children not from your
current marriage? Yes No

Yes No

Are any of your children or other
beneficiaries handicapped? Yes No

Yes No

Do you own a farm or business? Yes No

Yes No

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

Yes No

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

Yes No

Are you a U.S. citizen? Yes No

Yes No

Have you entered into any agreements with
your spouse (such as pre-nuptial or
community property agreement)? Yes No

Yes No

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Are there any serious health problems? Yes No Yes No

If yes, please describe briefly: _____

Do you own a long-term care (nursing home) insurance policy? Yes No Yes No

Do you hold everything jointly with your spouse, or is some property separate? All Joint Some Separate (except) IRAs, pensions, etc.

NET WORTH: If you added the value of all property owned by yourself and your spouse 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 the estate of yourself and your spouse?

What is the value of death benefits on life insurance?
Insuring Husband: _____ Insuring Wife: _____

What is the total amount of your outstanding liabilities? _____

ASSET LISTING

REAL ESTATE

How is it held?

H- Husband W- Wife

J- Joint S- Single

Address:

County:

Value:

Address:

County:

Value:

Address:

County:

Value:

Address:

County:

Value:

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If you do a trust plan, we will need your original deed(s) and current Town & County, School and Village tax bills. You can bring them with you for your first appointment and we will copy them at that time. If the deeds are mailed in, we can return them right away if you request, or at your Final Signing.

LIQUID ASSETS

How is it held?

H- Husband W- Wife

J- Joint S- Single

How many different ones do you own?

Value

Checking Accounts

Savings Accounts

Certificates of Deposit

Money Market Accounts

Brokerage Accounts

Stocks

Bonds- Government or Municipal

Unlisted Securities (not publicly traded)

Mutual Funds

Other Investment Accounts

Savings Bonds

Equity in Business

Sole Proprietorship

Partnership

Corporation

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Notes and Loans Receivable

Life Insurance

Owner

Beneficiary

Value

IRAs

Keoghs, 401(k)s, 403(b)s

Annuities

Other Assets

CHILDREN AND OTHER BENEFICIARIES

Name

Address

Date of Birth

Relationship

APPOINTMENTS

Personal Representative. The will should name a personal representative to probate the estate. (Personal representative is also sometimes referred to as executor or administrator.) Most people name their spouse as primary personal representative, with a child, relative, friend, or corporate trustee as alternate.

Personal Representative: _____

Alternate: _____ Second Alternate: _____

Successor Trustee. If you choose to avoid probate of your estate by executing a living trust during lifetime, a successor trustee should be named. The successor trustee would be responsible for managing assets if you, or in the case of a joint trust, either you or your spouse, could not manage assets due to incompetency. The successor trustee would distribute assets to beneficiaries after death, or in a joint trust, when neither you nor your spouse survive.

Successor Trustee: _____

Address: _____

Alternate: _____

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Address: _____

Second Alternate: _____

Address: _____

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? (Typically, the primary agent is the spouse.) It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent(s).

Health Care Agent: _____

Alternate: _____

Second Alternate: _____

GIFT TAX RETURNS. Have gift tax returns ever been filed to report gifts made? _____
If yes, please bring copies of the returns to your appointment.

1. Specific Gifts. Do you want to make charitable gifts, such as to a church or other institution? Do you wish to make a special gift to a particular person? This section is used mainly for cash gifts or more valuable items, such as an antique car or hunting cabin. All other items, such as jewelry, guns, quilts, etc., can be added later in the Schedule of Assets section of your Living Trust Binder.

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

All to spouse; then equally between children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.

All to spouse; then equally between surviving children.

All to spouse; then to _____.

As follows: _____.

3. Ultimate Distribution. You might want to provide for the distribution of your property if neither you, your spouse, or your children or other beneficiaries named above survive a common disaster.

PLEASE COMPLETE THIS SECTION ONLY IF YOU HAVE MINOR OR DISABLED BENEFICIARIES

Guardian. If you have minor children or an incompetent child, you will 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 in the event your first choice cannot serve.

Guardian: _____ Relationship: _____

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Address: _____
Alternate: _____ Relationship: _____
Address: _____

Testamentary Trustee. You may need a trustee to manage assets for children until they reach an age when you believe they should be capable of managing property on their own. A trustee can keep the children's money invested wisely and use it for their education, support, etc., until they reach the age specified for outright distribution of assets to them. The trustee can be a relative, friend, trust company or other person you trust to manage and distribute assets according to your wishes. The testamentary trustee can be the same person named as the guardian, or could be a different person.

Testamentary Trustee: _____
Alternate: _____

Age of Distribution. If you do establish a trust to allow a third party to manage assets for beneficiaries, then it is necessary for you to decide when the beneficiaries will be mature enough to manage assets on their own. You may want to give each beneficiary his/her share at the time the beneficiary reaches a particular age. You may consider splitting the distribution, such as 1/2 at age 25 and balance at age 30, or 1/3 at 21, 1/3 at 25, and 1/3 at 35. You may use any age or combination of ages that you choose.

GENERAL QUESTIONS

NOTES AND QUESTIONS: Please note anything else which may be of importance in planning your estate or note any special questions you may have.

