

Estate Planning Worksheet

A. Personal and Family Information

1. Husband's Full Name: _____ DOB: _____

2. Wife's Full Name: _____ DOB: _____

3. Address: _____

4. Phone: (Hm) _____ (M) _____ (M) _____

5. Email: (Husband) _____ (Wife) _____

6. Beneficiaries' Full Names; DOB; Address; Phone; Email:

- Plan of Asset Distribution for heirs; (e.g. to spouse for life, then to beneficiaries; or otherwise for special circumstances, e.g. if step-children, or children from first marriage, or second marriage, or special needs children, require different treatment etc.);

- Names in order for back-up trustee(s) who would be in charge of executing the terms of your estate plan if something happened to both spouses; (e.g. adult children, other trusted relatives or friends);

- Names of persons who would serve as guardians of minor children, if any;

- Any other specific instructions, e.g. specific bequests to certain individuals, church, charity, etc.

ENCLOSED IS A CHECK IN THE AMOUNT OF \$ _____ FOR THE PREPARATION OF MY/OUR LIVING TRUST(s), POUR OVER WILL(s), FINANCIAL POA(s), MEDICAL POA(s), AND LIVING WILL(s). PLEASE PROCEED WITH THE PREPARATION OF MY/OUR ESTATE PLAN DOCUMENTS. THANK YOU.

Signature

Signature