

ESTATE PLANNING/WILL INFORMATION FORM

1. Your Name: _____ Birthdate: _____
 Last First Middle

Spouse: _____ Birthdate: _____
 Last First Middle

Children: _____ Birthdate: _____
 Last First Middle

 Last First Middle Birthdate: _____

 Last First Middle Birthdate: _____

 Last First Middle Birthdate: _____

 Last First Middle Birthdate: _____

Mailing Address: _____ Phone: _____

City/State/Zip: _____

2. Do you have a will now? _____
If so, when prepared? _____

3. Have you been married before? _____
If so, were children born of that marriage? _____
If so, list their names and ages: _____

4. Has your spouse been married before? _____
If so, were children born of that marriage? _____
If so, list their names and ages: _____

5. Are both spouses U.S. Citizens? _____

6. Do you wish to be cremated or buried? _____
Are there any other specific bequests regarding this? _____

7. What are your general goals for your estate on your death (please rank).
- _____ Support Surviving Spouse
 - _____ Support children
 - _____ Minimize taxes and probate costs
 - _____ Charitable gifts
 - _____ Support other family members
 - _____ Other (please describe) _____
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8. Are any of your heirs or beneficiaries disabled and/or receiving government benefits?

9. Is there personal or real property you want to specifically mention in your will and leave to someone other than those who will receive the balance of your estate (family heirlooms, collections, etc.)?

Alternatively, if they were to die before you, who would you like to be an alternate beneficiary?

10. How do you wish to distribute the balance of your estate not disposed of by paragraph 9, above?

Alternatively, if they were to die before you, who would you like to be an alternate beneficiary?

11. Who do you want to be your executor/personal representative?

1 st Choice: _____	2 nd Choice: _____
Address: _____	Address: _____
City/State/Zip: _____	City/State/Zip: _____

3rd Choice: _____
Address: _____
City/State/Zip: _____

12. If you have minor children, and die at the same time as your spouse, who do you want to have act as guardian of your children?

1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

3rd Choice: _____
Address: _____
City/State/Zip: _____

13. Who do you want to have act as trustee of a trust for the benefit of your children or other beneficiaries?

1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

3rd Choice: _____
Address: _____
City/State/Zip: _____

14. Apart from allowing the trustee to pay whatever is required toward the health, education and support needs of your children while they are under age 19, at what age(s) do you want your children to receive the trust principal? One approach is to pay it at a certain age, i.e., 25-30. Another approach is to pay it in three installments (i.e., 1/3 at age 21, 1/3 of the balance at age 25, and the balance at age 30). Please state the ages and percentage to be distributed.

15. I recommend a Durable Power of Attorney. Do you presently have:

General Power of Attorney: _____ Living Will: _____
Durable Power of Attorney: _____ Medical Directive: _____

16. In the event of your incapacity, who would you name to act on your behalf?

1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

3rd Choice: _____
Address: _____
City/State/Zip: _____

17. Do you want your DPOA to go into effect now or upon disability? (Please circle one.)

18. (a) Estate taxes are an important consideration in estate planning. Each U.S. citizen is permitted to transfer tax free up to \$1,000,000 (the Unified Credit amount) throughout life, at death, or in combination thereof. Because the estate tax computation usually excludes amounts passing to the surviving spouse, it is often advantageous to use up as much of your tax credit upon your death in order to minimize the tax impact to your surviving spouse at his/her death. A simple way to determine whether you are a candidate for such planning is to determine whether your net assets (including life insurance proceeds) *combined with those of your spouse* equal or exceed the unified credit. If they do not and if you do not expect them to in the coming few years, then you are probably not a candidate for a will which addresses federal estate tax matters.

(b) If you are concerned that your net assets *combined with those of your spouse* are apt to equal or exceed the unified credit upon your death, then you should consider the estate tax (hg, Uncle Sam will take roughly 1/3 (or more) of the amount exceeding the unified credit which does not go to either charity or a surviving spouse). To provide you with a closer analysis of the estate tax prospects and your options, you need to provide a complete list of all assets you own that will transfer by reason of your death. WE ALSO ASK THAT YOU BRING IN COPIES OF ALL REAL ESTATE DEEDS AT THE TIME OF YOUR APPOINTMENT.

Asset	How Titled/Who Owns	Liens	Net Value
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Real Property

Personal Property

Stocks, Bonds, Investments & Acct. #s

Insurance	Who Owns?	Face Value	Named Beneficiary
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Pensions/IRA