



**ESTATE PLANNING INFORMATION PACKAGE**

Please Print All Information

**I. FAMILY INFORMATION**

HUSBAND'S NAME: \_\_\_\_\_  
VETERAN Yes\_\_\_ No\_\_\_  
ADDRESS \_\_\_\_\_  
TELEPHONE NUMBER \_\_\_\_\_  
E-MAIL ADDRESS \_\_\_\_\_

U.S. CITIZEN Yes\_\_\_ No\_\_\_  
BIRTHDATE \_\_\_\_\_

WIFE'S NAME: \_\_\_\_\_  
VETERAN Yes\_\_\_ No\_\_\_  
ADDRESS \_\_\_\_\_  
TELEPHONE NUMBER \_\_\_\_\_  
E-MAIL ADDRESS \_\_\_\_\_

U.S. CITIZEN Yes\_\_\_ No\_\_\_  
BIRTHDATE \_\_\_\_\_

DATE AND PLACE OF MARRIAGE: \_\_\_\_\_

DATE AND PLACE OF ANY DIVORCES (indicate which spouse): \_\_\_\_\_

\_\_\_\_\_

OTHER STATES YOU HAVE LIVED IN DURING CURRENT MARRIAGE: \_\_\_\_\_

\_\_\_\_\_

HAVE YOU SIGNED A PRENUPTIAL OR OTHER AGREEMENT WITH YOUR SPOUSE REGARDING PROPERTY RIGHTS? Yes\_\_\_ No\_\_\_  
IF YES, PLEASE PROVIDE A COPY OF THE AGREEMENTS.

II. CHILDREN

If you have any children, please provide the following information:

a. CHILDREN OF THIS MARRIAGE:

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

b. OTHER CHILDREN:

<u>NAME OF CHILD</u>	<u>ADDRESS</u>	<u>DOB</u>	<u>CUSTODY</u>
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PARENT: \_\_\_\_\_

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PARENT: \_\_\_\_\_

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If any of the children are under the age of 18, please name your first and second choice for the person you would want to have the responsibility for caring for such child until the child reaches 18. This person is called the guardian.

GUARDIAN OF CHILDREN: \_\_\_\_\_

ALTERNATE GUARDIAN: \_\_\_\_\_



IV. PROPERTY DISPOSITION

1. Who do you wish to receive your property at your death? If you want a specific property item to go to a specific person or organization, please indicate. If additional space is required, please use the back of this page.

a. SPECIFIC PROPERTY

RECIPIENT

_____	_____
_____	_____

b. BALANCE OF ESTATE

\_\_\_\_\_

PRIMARY RECIPIENTS:

\_\_\_\_\_  
\_\_\_\_\_

ALTERNATE RECIPIENTS:

\_\_\_\_\_  
\_\_\_\_\_

2. If you want to make any additional provisions for distribution, please describe on the back of this page.

3. Generally, property transferred to a minor (a person under 18 years of age) will be held by a conservator for the minor's benefit. The minor will receive the property, without restriction, at age 18. By using a trust, you may postpone a persons unrestricted right to property beyond age 18. If you would like to do this, at what age or ages would you want the person to receive the property? \_\_\_\_\_

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Who would you want to be the:

TRUSTEE: \_\_\_\_\_

SUCCESSOR TRUSTEE: \_\_\_\_\_

4. Who would you want to be the:

PERSONAL REPRESENTATIVE OF YOUR ESTATE: \_\_\_\_\_

ALTERNATE PERSONAL REPRESENTATIVE: \_\_\_\_\_

5. Who do you want to pay for the administrative costs of transferring your property:

a. all persons receiving property, proportionately; or

b. the following persons: \_\_\_\_\_.

6. Who do you want to pay any taxes resulting from the transfer of your property:

a. the persons receiving the property, proportionately; or

b. the following persons: \_\_\_\_\_.

7. Do you want your property to be transferred through a court supervised probate or would you prefer to have a probate avoided, if economically practiced?

\_\_\_\_\_.

V. ESTATE TAXES

If the value of the property you own separately and together with your spouse exceeds \$3,500,000, it is possible that federal estate taxes would have to be paid on your death or the death of your spouse. If this is the case, would you like advice on how you might reduce or eliminate that tax?

Yes \_\_\_\_\_

No \_\_\_\_\_

Property Information:

Real Estate:

Description & Location	Ownership	Market Value	Balance of Mortgage	Net Equity	Cost Basis
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Investments: (Stocks, Bonds, Loans, Mortgages, Certificates, etc.)

	Ownership	Net Equity	Cost Basis
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Bank Accounts:

	Ownership	Checking	Savings
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Miscellaneous: (Automobiles, Valuable Jewelry, Paintings, Coin Collections, Stamp Collections)

	Ownership	Net Value
_____	_____	_____

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Life Insurance:

Company	Type	Owner	Beneficiary	Alternate Beneficiary	Death Benefit	Policy Loans
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Retirement Benefits (Including IRAs):

	H	W	Beneficiary if any	Present Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Estate Summary

	H	W	Jt.
Real Estate	\$ _____	\$ _____	\$ _____
Investments	\$ _____	\$ _____	\$ _____
Bank Accounts	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____

Life Insurance (Beneficiary)	\$ _____	\$ _____	\$ _____
Retirement	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____	\$ _____