

ESTATE PLANNING AND WILL INFORMATION FORM

PERSON MAKING WILL:

Name: _____

Address _____

Phone No:(Home)_____ (Work)_____

Date of Birth:_____

SPOUSE:

Name: _____

Address _____

Phone No:(Home)_____ (Work)_____

Date of Birth:_____

CHILDREN – Please list all children, including any children not in your custody. If you do not plan to provide for a child in your will, the child must be specifically omitted by name.

Name: _____

Address _____

Date of Birth:_____

Name: _____

Address _____

Date of Birth:_____

Name: _____

Address _____

Date of Birth _____

Name: _____

Address _____

Date of Birth: _____

Have any children received an advance on their inheritance or are any children financially indebted to you.

If yes, do you want to make this an issue at the time of distribution of your estate?

Is there any reason to treat your children other than equally?

Are any of the children spendthrifts? _____

Are any children under a disability? _____

Please indicate if you have been married previously? _____

If any child should predecease parent, should his/her share pass through to his/her children? _____ . If so, please indicate grandchildren, if any. Include grandchildren born out of wedlock and indicate whether they should be entitled to inherit:

| Name | Date of Birth | Parents |
|-------|---------------|---------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Who should be guardian of your minor children? (A guardian has physical and legal control over your children until they reach the age of 18)

First Choice:

Name: _____

Address _____

Relationship: _____

Alternate:

Name: _____

Address _____

Relationship: _____

Do you wish to have a trust established for the benefit of your spouse and/or children? _____. If so, please indicate who the trustee(s) should be. (A trustee manages the assets for your children or other beneficiaries until they reach specified ages. If you do not establish a trust, children inherit at age 18. In the event you predecease your children before they attain the age of 18, the courts would govern any inheritance of your children through a guardianship. Trusts are generally established if you have minor children.) You may name an individual, bank or trust company or both.)

First Choice:

Name: _____

Address _____

Relationship: _____

Alternate:

Name: _____

Address _____

Relationship: _____

Ages for distribution to children from the trust: (Example: 1/3 @ 21, 1/3 @25 and 1/3 @30), _____

How should your estate be distributed if your spouse and/or children do not survive you?

If you do not have children, please indicate to whom your estate should pass (beyond a spouse, if any) and share to each person:

Who should be Personal Representative (“Executor”) of your estate? (A personal representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.)

First Choice: (Spouse is usually named first)

Name: _____

Address _____

Relationship: _____

Alternate:

Name: _____

Address _____

Relationship: _____

Second Alternate:

Name: _____

Address _____

Relationship: _____

ASSETS

Homestead:

Address: _____

Owners: _____

Approximate Fair Market Value _____

Encumbrances:

Mortgage Holder: _____ Amount Owing: _____

2nd Mortgage: _____ Amount Owing: _____

Contract for Deed: _____ Amount Owing: _____

Other Real Estate:

Address: _____

Owners: _____

Approximate Fair Market Value _____

Encumbrances:

Mortgage Holder: _____ Amount Owing: _____

2nd Mortgage: _____ Amount Owing: _____

Contract for Deed: _____ Amount Owing: _____

Bank Accounts/Investments

Checking:

Account Owner: _____

Name of Bank: _____

Approximate Avg. Balance: _____

Checking:

Account Owner: _____

Name of Bank: _____

Approximate Avg. Balance: _____

Savings:

Account Owner: _____

Name of Bank: _____

Approximate Avg. Balance: _____

Savings:

Account Owner: _____

Name of Bank: _____

Approximate Avg. Balance: _____

IRA's/Mutual Funds/Securities/401k's, ESOP's etc.

Account Owner: _____

Type of Account: _____

Name of Broker: _____

Approximate Avg. Balance: _____

Account Owner: _____

Type of Account: _____

Name of Broker: _____

Approximate Avg. Balance: _____

Account Owner: _____

Type of Account: _____

Name of Broker: _____

Approximate Avg. Balance: _____

Account Owner: _____

Type of Account: _____

Name of Broker: _____

Approximate Avg. Balance: _____

Life Insurance:

Policy Owner: _____

Type of Policy: _____

Amount of Policy: _____

Beneficiary (ies) _____

Policy Owner: _____

Type of Policy: _____

Amount of Policy: _____

Beneficiary (ies) _____

Policy Owner: _____

Type of Policy: _____

Amount of Policy: _____

Beneficiary (ies) _____

Policy Owner: _____

Type of Policy: _____

Amount of Policy: _____

Beneficiary (ies) _____

Do you wish to make any specific bequests in your will other than by a list provided in your will?

Do you have a safe-deposit box?_____ If so, where?_____

Do you expect any inheritance in the near future?_____
If so, please give details:_____

Do you have any other assets of any kind, such as business interests?_____. If so, please list: _____

Are you interested in preparing a Power of Attorney granting another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name?_____

Are you interested in preparing a Health Care Declaration (“living will”) stating your preferences for health care if you are in a terminal condition?_____