

CLIENT A

CLIENT B

15. Have you ever made a gift in excess of \$10,000? _____

16. Do you anticipate receiving an inheritance? Approximate size? _____

17. Are you a trust beneficiary? * _____

18. Do you own property located in another state? _____

* If you answered "yes" to any of these questions, please bring a copy of the prior will, nuptial agreement, separation agreement, decree of dissolution, trust agreement, or other applicable document with you to our initial meeting.

II. BENEFICIARIES

When we meet to discuss your estate planning, I will review with you in detail the various ways property can be distributed upon your death. For now, however, please list the names of the persons, groups of persons, or entities (including charitable organizations) that you would like to benefit from your estate upon your death or upon the death of the surviving spouse.

19. Specific beneficiaries. List the persons or entities to which you wish to make gifts of cash or real property upon your death.

_____	_____
_____	_____
_____	_____
_____	_____

20. Residuary beneficiaries. List the persons, or entities to which you wish to leave the remainder of your estate after specific bequests are made.

_____	_____
_____	_____
_____	_____
_____	_____

21. Contingent beneficiaries. If none of the residuary beneficiaries is living or is in existence at the time of your death, to whom or to what entities do you want your estate to pass?

_____	_____
_____	_____

III. FIDUCIARIES

In the course of your estate planning, you will be required to select fiduciaries, which are individuals or entities entrusted to act on your behalf in some capacity, such as to administer assets of your estate upon your death, to administer trust assets on behalf of beneficiaries, to make health care decisions for you if you are unable to make those decisions yourself, or to take care of your minor children in the event that you are unable to do so. Below, I have asked you to supply names and addresses for the persons whom you have selected for such fiduciary positions. In addition, please list the appointed fiduciary's relationship to you. When choosing a fiduciary, please note that it is often appropriate for a surviving spouse to act in such capacity and that you can name more than one person to act as a fiduciary. If you are having trouble choosing fiduciaries, feel free to skip over this section. I will go over each fiduciary position in detail when we meet to discuss your estate planning.

Personal representative: Often called an "executor," a personal representative has broad powers to administer and distribute your property after your death.

	<u>CLIENT A</u>	<u>CLIENT B</u>
22. Personal representative:	_____	_____
	_____	_____
	_____	_____
23. Successor personal representative:	_____	_____
	_____	_____
	_____	_____

Trustee: A trustee is a person or entity who administers and distributes property held in a trust. A trust may be established under your will for a variety of purposes such as for tax purposes or for the purpose of administering property that would otherwise pass outright to minor children.

24. Proposed trustee:	_____	_____
	_____	_____
	_____	_____
25. Successor trustee:	_____	_____
	_____	_____
	_____	_____

Guardian: A guardian is a court approved individual who makes decisions regarding a minor child's support, care, education, health, and welfare.

CLIENT A

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26. Guardian:

_____	_____
_____	_____
_____	_____

27. Successor guardian:

_____	_____
_____	_____
_____	_____

Agent with financial power of attorney: An agent with financial power of attorney is a person authorized to make financial decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for yourself while you have capacity or to make those decisions for you in the event that you are incapacitated.

28. Agent with financial power of attorney:

_____	_____
_____	_____
_____	_____

29. Successor agent with financial power of attorney:

_____	_____
_____	_____
_____	_____

Agent with medical power of attorney: An agent with medical power of attorney is a person authorized to make medical and healthcare decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for yourself while you have capacity or to make those decisions for you in the event that you are incapacitated.

30. Agent with medical power of attorney:

_____	_____
_____	_____
_____	_____

31. Successor agent with medical power of attorney:

_____	_____
_____	_____
_____	_____

IV. ASSETS

Please list the value of the following assets owned by you, by your partner, or jointly. It is not necessary to provide the exact value of each asset; an approximation or average balance is sufficient. If you have any questions about the information requested below, please feel free to make a note and I will discuss it with you in detail when we meet.

	<u>CLIENT A</u>	<u>CLIENT B</u>	<u>JOINT</u>
32. Cash	_____	_____	_____
33. Checking Accounts	_____	_____	_____
34. Savings Accounts	_____	_____	_____
35. CDs	_____	_____	_____
36. Money Market Funds	_____	_____	_____
37. Stocks & Stock Funds	_____	_____	_____
38. Taxable Bonds/Bond Funds	_____	_____	_____
39. Retirement Funds	_____	_____	_____
Beneficiaries:	_____	_____	_____
40. 401(k) Plans	_____	_____	_____
Beneficiaries:	_____	_____	_____
41. IRAs	_____	_____	_____
Beneficiaries:	_____	_____	_____
42. Keoghs	_____	_____	_____
Beneficiaries:	_____	_____	_____
43. Annuities	_____	_____	_____
Beneficiaries:	_____	_____	_____
44. Primary Residence	_____	_____	_____
45. Secondary Residence	_____	_____	_____
46. Other Real Estate	_____	_____	_____

	<u>CLIENT A</u>	<u>CLIENT B</u>	<u>JOINT</u>
47. Copyrights, Royalties, Patents, Trademarks, and other Tangible Rights	_____	_____	_____
48. Life Insurance Beneficiaries:	_____ _____	_____ _____	_____ _____
49. Long-term Care Insurance:	_____	_____	_____
50. Motor Vehicles	_____	_____	_____
51. Boats	_____	_____	_____
52. Aircraft	_____	_____	_____
53. Sports and Hobby Equipment	_____	_____	_____
54. Household Possessions (Antiques, artwork, jewelry, collections, etc.)	_____	_____	_____
55. Interests in Trusts	_____	_____	_____
56. Family Business	_____	_____	_____
57. Other Business Interests	_____	_____	_____
58. Property subject to a power of appointment	_____	_____	_____
59. Other	_____	_____	_____
TOTAL ASSETS	_____	_____	_____
V. LIABILITIES			
60. Real Estate Mortgage	_____	_____	_____
61. Auto Loans	_____	_____	_____
62. Business Loans	_____	_____	_____
63. Educational Loans	_____	_____	_____

	<u>CLIENT A</u>	<u>CLIENT B</u>	<u>JOINT</u>
64. Other Long-term Debt	_____	_____	_____
65. Credit Card Debt	_____	_____	_____
66. Personal Loans	_____	_____	_____
67. Other Short-term Debt	_____	_____	_____
TOTAL LIABILITIES	_____	_____	_____