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**ESTATE PLANNING AND WILL INFORMATION FORM**

Please fill out as much information as you can and provide to us at your earliest convenience. Don't worry if you are unable to fill out certain information below as we use this as a good starting point for our discussions with you on your estate planning needs and goals.

**Testator (Person(s) making will)**

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security No. \_\_\_\_\_ U.S. Citizen? Yes \_\_\_ No \_\_\_

Spouse Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse's Soc. Sec. No. \_\_\_\_\_ U.S. Citizen? Yes \_\_\_ No \_\_\_

Street Address \_\_\_\_\_ Apt \_\_\_\_\_ County \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

State of Residence \_\_\_\_\_

Telephone Number H: \_\_\_\_\_ W/Client: \_\_\_\_\_ W/Spouse: \_\_\_\_\_

a. Have you and your spouse signed a Premarital Agreement?

b. Have you or your spouse been divorced?

**Children**

Please list ALL your children, including deceased children, children born out of wedlock, and children you wish to omit from your estate plan.

<u>Name of Child</u>	<u>Address</u>	<u>Date of Birth</u>

Identify any child who is not a natural or adopted child of both you and your spouse.

Do you have any special concerns or objectives regarding your children?

**Guardians.** 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.)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Alternate Guardian: \_\_\_\_\_

Address: \_\_\_\_\_

**Personal Representative.** 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.

Name: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Address: \_\_\_\_\_

Alternate Personal Representative: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Address: \_\_\_\_\_

**Trusts.**

If a trust is appropriate to include in your estate plan, who should be the trustee? A trustee is the person or entity who is responsible for managing the assets placed into the trust. A trustee manages the assets for your children or other beneficiaries until they reach specified ages. If you do not establish a trust, children may inherit at age 18 or 21. You may name an individual, bank or trust company, or both to act as your trustee.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Alternate Trustee: \_\_\_\_\_

Address: \_\_\_\_\_

**Assets and Liabilities.**

Use approximate values under each person showing ownership of each asset. **BRING SUPPORTING DATA FOR EACH ASSET**, i.e. bank statements, retirement reports, stock and bond account reports, etc. **NOTE:** If you are entering into a revocable (living) trust, bring copies of deeds to real estate you own.

ASSETS	VALUE
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**Accountant/Financial Advisors**

Accountant:

Address:

Telephone:

Financial Advisor:

Address:

Telephone:

**Primary Physician**

Who is your primary physician?

Name: \_\_\_\_\_

Address: \_\_\_\_\_

**Discussion Issues**

We will discuss the following issues at the meeting:

- \* Current Will. Do you now have a will or revocable trust? If so, bring a copy to the interview meeting.
- \* Predeceased Child. If any child should predecease parent, should his/her share pass through to his/her children? If so, please indicate grandchildren, if any.
- \* Trusts. Do you wish to have a trust established for the benefit of your spouse and/or children?
- \* Specific Gifts. Do you wish to make any specific bequests to charities or individuals?
- \* No Family Survives. How should your estate be distributed if your spouse and/or children do not survive you? (For example: family, charity, etc.)