

Deceased Children

<u>FULL NAME</u>	<u>DATE OF BIRTH</u>	<u>DATE OF DEATH</u>

Grandchildren

<u>FULL NAME</u>	<u>PARENT/RESIDENCE</u>	<u>SEX</u>	<u>AGE</u>	<u>MARRIED?</u>	<u>DATE OF BIRTH</u>

Other Dependents

<u>FULL NAME</u>	<u>SEX</u>	<u>AGE</u>	<u>RELATIONSHIP</u>	<u>RESIDENCE</u>	<u>DATE OF BIRTH</u>

If you are separated or divorced from the father or mother of the above children, please state:

The other parent's name:	
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The amount of support your former spouse is required to pay per week or month per child:

Has the divorce been granted?

Are the questions of alimony, division of property, child support and child custody still open?

Are any of your children adopted?

<u>FULL NAME</u>	<u>SEX</u>	<u>AGE</u>	<u>RESIDENCE</u>	<u>DATE OF BIRTH</u>

QUESTIONS TO CONSIDER IN ADVANCE OF ESTATE PLANNING CONFERENCE

1. Do your children (or grandchildren) have any problems or handicaps which should be considered in devising your estate plan? Do you have the responsibility for the support of any person other than your spouse and children?

2. Are there any items of personal property (jewelry, silver, artwork, etc.) with emotional significance that you want a

specific friend or family member to have upon your death? If so, list each item and each corresponding recipient.

3. Do you wish to make any gifts or contributions of property or money to any friends, relatives, churches, or charities? If so, please indicate to whom and type or amount of gift.

4. Do you wish to leave your property to your spouse (and alternatively your offspring) upon your death?

5. If you have children, at what age do you want them to inherit your estate? [For example 1/3 at 25, 1/3 at 30, and 1/3 at 35]

6. If you, your spouse, and all descendants were killed in a common disaster, whom would you want to have your property? (Have your spouse answer this question separately if applicable).

7. In the event your spouse does not survive you, whom would you name guardian and successor guardian of your minor

children? Give the cities and states of residence for each.

GUARDIAN		
	NAME	ADDRESS
1 st Guardian		
2 nd Guardian		
3 rd Guardian		

8. If you want an individual to serve as Executor and/or Trustee (with or without a Bank as Co-Executor or Co-Trustee), whom would you name? Also name a successor and give the cities and states of residence for each.

EXECUTOR		
	NAME	ADDRESS
1 st Executor		
2 nd Executor		
3 rd Executor		

TRUSTEE		
	NAME	ADDRESS
1 st Trustee		
2 nd Trustee		
3 rd Trustee		

9. Please state if you have a preference regarding burial, cremation, or anatomical gifts.

10. Powers of attorney are often used to authorize someone to act for you under certain conditions, specially legal incapacitation. If you desire a power of attorney, whom would you name as your agent (and successor agent) under such a power?

DURABLE FINANCIAL POWER OF ATTORNEY		
	NAME	ADDRESS
1 st Agent		
2 nd Agent		
3 rd Agent		

11. Do you desire a Durable Power of Attorney for Healthcare?

DURABLE POWER OF ATTORNEY FOR HEALTH CARE				
	NAME	ADDRESS	HOME #	WORK #
1 st Agent				
2 nd Agent				
3 rd Agent				

12. Describe any special problems that you foresee within your estate.

13. Is it likely that you or your spouse will inherit a significant amount from others? If so, in what estimated dollar amount and from whom?

14. Are you or your spouse the life beneficiary of any trust which will pass to others at your death? If so, what is the estimated value of the trust and who set up the trust?

NOTE: It will be helpful for you and your spouse to provide the firm you present Wills (if any) and also insurance policies, deeds, trust agreements, buy-sell agreements and any other documents or contracts affecting your estate.

ASSETS

	Husband	Wife	Joint
Cash			
Listed or Traded Securities or Stocks			
Closely Held Untraded Securities or Stocks			
Partnership or Sole Proprietor Interests			
Real Estate Held for Investment			
Personal Residence			
Life Insurance			
Employee Benefits			
Business Interests			
IRA(s)			
Cars			
Other Personalty			
Miscellaneous Assets			
TOTAL			

LIABILITIES

	Husband	Wife	Joint
Loans and Notes to:			
Banks			
Insurance Policies			
Stock Broker (Margin Account)			
Pledges to Charities			
Real Estate			
Mortgages			
Taxes			
Other			
TOTAL			