

## Confidential Estate Planning Information

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I.

Your Name:	Spouse's Name:
*This is how your name will appear on your Estate Planning documents.	

	Your Information:	Spouse's Information:
<b>Mailing Address:</b>		
<b>Street Address:</b> (if different from above)		
<b>Birthdate:</b>		
<b>Social Security Number:</b>		
<b>E-mail Address:</b>		
<b>Home Phone:</b>		
<b>Business Phone:</b>		
<b>Cell Phone:</b>		
<b>Pager:</b>		
<b>Facsimile:</b>		
*Indicate with a "Y" for yes or an "N" for no as to whether or not it is okay to leave voice mail messages at the number indicated.		

II.

Please list all of your children and the children of each deceased child. Use additional sheets of paper if necessary.

Name and Relationship	Birthdate	Address & Phone	Related to:
			(Check) <input type="checkbox"/> YOU <input type="checkbox"/> SPOUSE <input type="checkbox"/> BOTH
	<b>Age</b>		
<b>Please circle marital status:</b>			
MARRIED	SINGLE	DIVORCED	

Name and Relationship	Birthdate	Address & Phone	Related to:
			(Check) <input type="checkbox"/> YOU <input type="checkbox"/> SPOUSE <input type="checkbox"/> BOTH
	<b>Age</b>		
<b>Please circle marital status:</b>			
MARRIED	SINGLE	DIVORCED	

Name and Relationship	Birthdate	Address & Phone	Related to:
			(Check) <input type="checkbox"/> YOU <input type="checkbox"/> SPOUSE <input type="checkbox"/> BOTH
	<b>Age</b>		
<b>Please circle marital status:</b>			
MARRIED	SINGLE	DIVORCED	

Name and Relationship	Birthdate	Address & Phone	Related to:
			(Check) <input type="checkbox"/> YOU <input type="checkbox"/> SPOUSE <input type="checkbox"/> BOTH
	<b>Age</b>		
<b>Please circle marital status:</b>			
MARRIED	SINGLE	DIVORCED	

<p>Are any children handicapped or have special circumstances? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Has either spouse been previously married? (Y or N) _____</p> <p>Does either spouse presently have a Will? (Y or N) _____</p> <p>(If yes, please provide copy for review).</p>
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III.

**Terms of Your Will**

\*\*\*You and your spouse will need to consider and be prepared to discuss the following at the time of the initial conference:

1. Who do you want to handle the administration of your estates?  
(Your Executor or Co-Executors). You'll need first and alternate choices.

1st choice: \_\_\_\_\_

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

2. Who do you want to receive the bulk of your property?  
(spouse, children, etc.)

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

3. Any special bequests you wish to make? (such as a gift to charity,  
or a gift of a particular piece of jewelry to a particular child, etc.)

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

4. Who do you want to name as Guardian of the Person of any minor  
child or children? (These are the people who will actually raise your  
children. If your children are very young, you should name alternates.)

1st Choice: \_\_\_\_\_

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

5. The age or ages at which you wish your children to actually receive outright any property passing to them under your will: (i.e. 18, 21, 25)

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6. Who you want to serve as Trustee or Trustees of any trusts created under your Will. Again, you should name alternates.

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7. Indicate whether you or your spouse expect to inherit any substantial property in the future which might affect the planning of your estate:

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8. Who would you wish to receive your property if you, your spouse, your children and all your descendants died in common accident or disaster?

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