



Estate Planning Worksheet

LEGACY LAW GROUP

**Providing Estate Planning & Probate Services
to Help You Protect What Matters Most.**

USING THIS ORGANIZER WILL ASSIST US IN DESIGNING AN ESTATE PLAN THAT MEETS YOUR NEEDS AND GOALS.

ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

Part I
Personal / Family Information

Full Legal Name _____
(name most often used to title property and accounts)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ Cell Phone: _____

E-mail Address _____ It is okay to communicate with me via my E-mail address.

Children and Other Family Members
Use full legal name:

| <u>Name</u> | <u>Birth Date</u> | <u>Relationship</u> |
|-----------------|-------------------|---------------------|
| _____ | _____ | _____ |
| Comments: _____ | | |
| _____ | _____ | _____ |
| Comments: _____ | | |
| _____ | _____ | _____ |
| Comments: _____ | | |
| _____ | _____ | _____ |
| Comments: _____ | | |

Advisors

| Name | Telephone |
|----------------------------|------------------|
| Personal Attorney _____ | _____ |
| Accountant _____ | _____ |
| Financial Advisor _____ | _____ |
| Life Insurance Agent _____ | _____ |

Your Concerns

Please rate the following as to how important they are to you:

(H high concern, S some concerned, L low concern, N/A no concern or not applicable)

Description

Level of Concern

Desire to get affairs in order and create a comprehensive plan to manage affairs in case of death or disability.

Providing for and protecting children.

Providing for and protecting grandchildren.

Disinheriting a family member.

Providing for charities at the time of death.

Plan for the transfer and survival of a family business.

Avoiding or reducing your estate taxes.

Avoiding probate.

Reduce administration costs at time of your death.

Avoiding a conservatorship (“living probate”) in case of a disability.

Avoiding will contests or other disputes upon death.

Protecting assets from lawsuits or creditors.

Preserving the privacy of affairs in case of disability or at time of death from business competitors, predators, dishonest persons and curiosity seekers.

Plan for a child with disabilities or special needs, such as medical or learning disabilities.

Protecting children’s inheritance from the possibility of failed marriages.

Provide that your death shall not be unnecessarily prolonged by artificial means or measures.

Other Concerns (Please list below):

Part II
Document Nomination Information

PERSONS TO ACT FOR YOU (*note: your answers may be identical to your spouses*)::

PERSONAL REPRESENTATIVE:

| Name and Address | Relationship |
|------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

GUARDIAN(S) FOR MINOR CHILDREN: If you have any child(ren) under the age of 18, list in order of preference who you wish to serve as **guardian for your child(ren)**.

| Name and Address | Relationship |
|------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

TRUSTEE(S) FOR ANY MINOR AND/OR SPECIAL NEEDS TRUST:

| Name and Address | Relationship |
|------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

HEALTH POWER OF ATTORNEY: If you were unable to make health care decisions for yourself, who would you want to make decisions for you with regard to your medical treatment?

| Name and Address | Relationship |
|------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

FINANCIAL POWER OF ATTORNEY: If you were unable to make financial decisions for yourself, who would you want to make those decisions for you?

| Name and Address | Relationship |
|------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

DISTRIBUTIONS OF TANGIBLE, PERSONAL PROPERTY AND SPECIFIC GIFTS

USE OF PERSONAL PROPERTY MEMORANDUM: Do you want to provide that some or all your tangible, personal property may be distributed according to a written list you may prepare later? Yes No

SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charities.

| Individual or Charity | Amount or Property |
|-----------------------|--------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

DIVISION OF THE BALANCE OF YOUR PROPERTY UPON YOUR DEATH

DIVIDE EQUALLY BETWEEN MY CHILDREN AND THE DESCENDANTS OF ANY DECEASED CHILDREN;

DIVIDE AMONG NAMED INDIVIDUALS and/or CHARITIES:

OTHER:

HOW AND WHEN TO DISTRIBUTE MY PROPERTY:

DISTRIBUTE OUTRIGHT TO BENEFICIARIES: Provides no protection from creditors, predators, or from themselves.

STRUCTURED TRUST: You determine how long the property is to remain in trust. During the period of time the property is held in trust it is available to the beneficiary for needs (health, education and maintenance). You may give written instructions to the trustee outlining guidelines to be followed in determining the beneficiary's needs. You may provide for a staggered distribution of principal; i.e. 1/3 at age 30 and balance at age 40. You decide who will manage the property and to carry out your distribution instructions. Does the beneficiary have a right to be a co-trustee and/or choose his or her own co-trustee? You decide how the trust is designed. List your desires:

REMOTE CONTINGENT BENEFICIARIES

Who do you want to receive your property in the remote event that no one listed above is alive to receive your property. Determining the remote contingent beneficiary is not so important that it should cause you to delay completion of your entire estate plan. It can always be changed at a later date.

In the remote event no one listed above is alive to receive my property I want my property distributed as follows:

- To my heirs-at-law.
- To the following named individuals and/or charities:

OTHER ITEMS TO INCLUDE OR DISCUSS: Your estate plan should address all important issues (e.g., how to handle prior loans to children/others) as well as hopes, fears, and wishes. Please list any other items you want included or want to discuss:
