



Estate Planning Worksheet

LEGACY LAW GROUP

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**

Spouse 1: 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 _____ County of Residence _____ Business Telephone _____
Employer _____ Position _____
Business Address _____ City _____ State _____ Zip _____
E-mail Address _____ It is okay to communicate with me via my E-mail address.

Spouse 2: 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 _____ County of Residence _____ Business Telephone _____
Employer _____ Position _____
Business Address _____ City _____ State _____ Zip _____
E-mail Address _____ It is okay to communicate with me via my E-mail address.
Date of Marriage: _____

Children and Other Family Members

Please list full legal name. And, under Relationship, use "JT" if both spouses are the parents; "W" if wife is the parent, "H" if the husband is the parent. Also, please use "D" if the child is deceased.

<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):

Important Family Questions

(Please check "Yes" or "No" for your answer)	Yes	No
Are you receiving Social Security, disability, or other governmental benefits? <i>Describe</i> _____		
Are you making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
Have you been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you ever filed federal or state gift tax returns? <i>Please furnish copies of these returns</i>		
Have completed previous will, trust, or estate planning? <i>Please furnish copies of these documents</i>		
Do you support any charitable organizations now that you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are there any other charitable organizations you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are you currently the beneficiary of anyone else's trust? <i>If so, please explain below.</i>		
Do any of your children have special educational, medical, or physical needs?		
Do any of your children receive governmental support or benefits?		
Do you provide primary or other major financial support to adult children or others?		

Additional Information

Part II
Document Nomination Information

PERSONS TO ACT FOR YOU:

SPOUSE 1.

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 CARE 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

_____	_____
_____	_____
_____	_____

PERSONS TO ACT FOR YOU:

SPOUSE 2.

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

_____	_____
_____	_____
_____	_____

COMMUNITY PROPERTY AND SEPARATE PROPERTY

Does either spouse have "separate property"? ___ YES ___ NO ___ NOT SURE

If "yes," please describe: _____

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

Any property not listed on the memorandum should be distributed to:

- Spouse. Children equally. To the balance of the trust.
- Other named individuals. List on next line.

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

- ALL TO SPOUSE;
- 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:

Part III Property Information

THE FOLLOWING PAGES ARE INTENDED TO HELP YOU IDENTIFY ASSETS. IT IS NOT MANDATORY THAT YOU COMPLETE THIS SECTION FOR PURPOSES OF OUR MEETING.

Instructions for Completing the Property Information checklist:

General Headings

This *Property Information* checklist is to help you list all the property you own and what it is worth. You probably won't own property under all the headings; if not, just leave those blank. Under certain headings you may own more property than can be listed on this checklist. If so, attach **extra sheets** of paper to list your additional property.

Type

Immediately after the heading for each kind of property is a brief explanation of what property you should list under that heading.

“Owner” of Property

How you own your property is **extremely important** for purposes of properly designing and implementing your estate plan. For each property, please indicate how the property is titled using the following abbreviations:

Owner of Property	Use
If own property in your name only	I
Joint Tenancy with someone other than a spouse, i.e. a child, parent, etc.	JTO
If you cannot determine how the property is owned	?

Real Property

TYPE: Any interest in real estate including your family residence, vacation home, time share, vacant land, etc.

General Description and/or Address	Owner	Market Value	Loan Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
	<i>Total</i>	_____	_____

Furniture and Personal Effects

TYPE: List separately only major personal effects such as jewelry, collections, antiques, furs, and all other valuable non-business personal property (*indicate type below and give a lump sum value for miscellaneous, less valuable items.*)

Type or Description	Owner	Market Value
Miscellaneous Furniture and Household Effects (Total)	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	<i>Total</i>	_____

Automobiles, Boats, and RVs

TYPE: For each motor vehicle, boat, RV, etc. please list the following: description, how titled, market value and encumbrance:

Bank Accounts

TYPE: Checking Account "CA", Savings Account "SA", Certificates of Deposit "CD", Money Market "MM" (*indicate type below*). Do not include IRAs or 401(k)s here

Name of Institution and account number	Type	Owner	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
		<i>Total</i>	_____

Note: If Account is in your name (or your spouse's name) for the benefit of a minor, please specify and give minor's name.

Stocks and Bonds

TYPE: List any and all stocks and bonds you own. If held in a brokerage account, lump them together under each account.
(indicate type below)

Stocks, Bonds or Investment Accounts	Type	Acct. Number	Owner	Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Total</i>				_____

Life Insurance Policies and Annuities

TYPE: Term, whole life, split dollar, group life, annuity. **ADDITIONAL INFORMATION:** Insurance company, type, face amount (death benefit), whose life is insured, who owns the policy, the current beneficiaries, who pays the premium, and who is the life insurance agent.

<i>Total</i>				_____

Retirement Plans

TYPE: Pension (P), Profit Sharing (PS), H.R. 10, IRA, SEP, 401(K). **ADDITIONAL INFORMATION:** Describe the type of plan, the plan name, the current value of the plan, and any other pertinent information.

<i>Total</i>				_____

Business Interests

TYPE: General and Limited Partnerships, Sole Proprietorships, privately owned corporations, professional corporations, oil interests, farm and ranch interests. **ADDITIONAL INFORMATION:** Give a description of the interests, who has the interest, your ownership in the interests, and the estimated value of the interests.

Total _____

Money Owed to You

TYPE: Mortgages or promissory notes payable to you, or other moneys owed to you.

Name of Debtor	Date of Note	Maturity Date	Owed to	Current Balance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
			<i>Total</i>	_____

Anticipated Inheritance, Gift, or Lawsuit Judgment

TYPE: Gifts or inheritances that you expect to receive at some time in the future; or moneys that you anticipate receiving through a judgment in a lawsuit. **Describe in appropriate detail.**

Description _____

Total estimated value _____

Other Assets

TYPE: Other property is any property that you have that does not fit into any listed category.

Type	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
		<i>Total</i>

Summary of Values

Assets	Amount*		Total Value
	Spouse 1	Spouse 2	
Real Property	_____	_____	_____
Furniture and Personal Effects	_____	_____	_____
Automobiles, Boats and RV's	_____	_____	_____
Bank and Savings Accounts	_____	_____	_____
Stocks and Bonds	_____	_____	_____
Life Insurance and Annuities	_____	_____	_____
Retirement Plans	_____	_____	_____
Business Interests	_____	_____	_____
Money owed to you	_____	_____	_____
Anticipated Inheritance, Etc.	_____	_____	_____
Other Assets	_____	_____	_____
Total Assets:	_____	_____	_____

* *Values for property owned with other put your percentage in client's column and other's percentage in other's column.*