

PART I – YOUR FAMILY FACTS

A. Husband’s Full Name _____
Home Address _____
Home Phone _____ Office Phone _____ Cell Phone _____
Fax _____ Email Address _____
Date of Birth _____ U.S. Citizen Yes No

B. Wife’s Full Name _____
Home Address _____
Office Phone _____ Cell Phone _____ Fax _____
Email Address _____ Date of Birth _____
U.S. Citizen Yes No Date and Place of Marriage _____

C. Children (Natural and/or Adopted)

Full Legal Name: _____
Date of Birth: _____
Child of: Husband Wife Both
 Male Female Living Deceased

Full Legal Name: _____
Date of Birth: _____
Child of: Husband Wife Both
 Male Female Living Deceased

Full Legal Name: _____
Date of Birth: _____
Child of: Husband Wife Both
 Male Female Living Deceased

Full Legal Name: _____
Date of Birth: _____
Child of: Husband Wife Both
 Male Female Living Deceased

Additional Children (attach additional page)

If there is a deceased child, did they leave any surviving children? yes no

D. Name and telephone number of Accountant/ CPA:

E. Name and telephone number of Financial Advisor (e.g., Stock Broker, Financial Planner, etc)

F. Employment: Occupation _____

Employer’s Name: _____

G. Referred by: _____

PART II – TRUSTEE/ EXECUTOR/ AND AGENT INFORMATION

A. Who would you like to act as **Successor Trustee(s) of your Trust?** (It is assumed that you and your spouse will act as the initial Trustees and the surviving spouse will act as the sole Trustee. The Trustee’s job is to manage the assets of the trust(s) created under the Living Trust or Will and make distributions to the beneficiaries of the trust(s) in accordance with the provisions of the trust(s).)

1st Choice

Name: _____

Relationship: _____

Phone Number: _____

2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

B. Who would you like to act as **Executor(s) of your Last Will and Testament?** (It is assumed that your spouse will act as your initial Executor. The primary purpose of the pour-over will is to administer probate for any assets that were not properly transferred to the Trust.)

CHECK BOX IF EXECUTORS WILL BE SAME AS TRUSTEES

Husband’s 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife’s 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband’s 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife’s 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband’s 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife’s 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

C. Who would you like to serve as **guardian of your minor child(ren)** (under 18)? (It is assumed that you and your spouse will act as the initial guardian of your minor children and the surviving spouse will act as the sole guardian). If you have no minor children, go to Section D below.

1st Choice

Name: _____

Relationship: _____

Phone Number: _____

2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

D. Who would you like to serve as your agent under a **Power of Attorney for financial purposes?** (It is assumed that your spouse will act as your initial agent.) The person you designate to act as your agent will have the power to sign your name as your “attorney in fact” during certain specified financial transactions. In the event of your incapacity, the person you have designated as your “attorney in fact” shall also be the person to be appointed the Conservator of your estate:

CHECK BOX IF AGENTS WILL BE SAME AS TRUSTEES

Husband's 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband's 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband's 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

E. Who would you like to serve as your agent under a **Power of Attorney for health care purposes?** (It is assumed that your spouse will act as your initial agent). The person you designate to act as your agent will have the power to make health care decisions on your behalf.

Husband's 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 1st Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband's 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 2nd Choice

Name: _____

Relationship: _____

Phone Number: _____

Husband's 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

Wife's 3rd Choice

Name: _____

Relationship: _____

Phone Number: _____

F. Husband's desires regarding organ donation, disposition of remains and life-sustaining treatment:

Do you desire to be buried or cremated?

Buried Cremated Agent Decides

Do you desire to be an organ donor?

Yes No Agent Decides

Purposes for which your organs can be used: Transplant Research Education

What are your desires regarding life-sustaining treatment in the event that you are terminally ill or in an irreversible coma or vegetative state?

No life-sustaining treatment sustaining
 Life-sustaining treatment to allow me to live as long as possible
 Agent Decides

G. Wife's desires regarding organ donation, disposition of remains and life-sustaining treatment:

Do you desire to be buried or cremated?

Buried Cremated Agent Decides

Do you desire to be an organ donor?

Yes No Agent Decides

Purposes for which your organs can be used: Transplant Research Education

What are your desires regarding life-sustaining treatment in the event that you are terminally ill or in an irreversible coma or vegetative state?

No life-sustaining treatment sustaining
 Life-sustaining treatment to allow me to live as long as possible
 Agent Decides

PART III – BENEFICIARY INFORMATION

A. **Special Gifts** to individuals/charities. After the death of you and your spouse but prior to making the distributions listed in Section B, do you want to give any specific items to a family member or other individual or charity? (example: charitable donation, high-end heirloom items, real property) **Specific Gifts are not a requirement and we will provide you with a “Personal Letter of Instruction” to add personal items at a later time, if you wish.*

Name of Person/Charity	Relationship to you and/or spouse	Description of Gift
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

B. **Percentage Beneficiaries:** After you and your spouse’s death who should receive your **remaining** estate (also known as “the residue”)?

Check box if your remaining estate is to be divided equally between your children

Name of Person/Charity	Relationship to you and/or spouse	Percentage
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

C. **Alternate Beneficiaries:** If a beneficiary named above predeceases you and your spouse, will that deceased beneficiary’s share go to that person’s lineal descendants? (i.e. children)
 Yes No **OR**
to the other surviving named beneficiaries listed above in equal shares Yes No
If nothing is specified by you, the deceased-beneficiary’s share will go to his or her lineal descendants.

D. **Separate Share Trust Distribution Instructions:** If you have minor children, at what specified age(s) do you want your beneficiaries to receive their inheritance? (example: 50% at age 25 and remainder at age 30)

If nothing is specified by you, the default distribution will occur upon the beneficiary(ies) attaining eighteen (18) years of age.

E. Are any of your beneficiaries listed above disabled and require special care? Are they currently receiving (or will likely in the future) government benefits? If yes, a “Special Needs Trust” may be necessary. Please discuss your circumstances with the attorney.

Name	Age/Relationship to you and/or Spouse	Explanation
_____	_____	_____
_____	_____	_____

F. Do you have any pets that you want to provide for their care and welfare?

Type of animal: _____
Amount of caretaking funds (if any): \$ _____
Name of initial caretaker: _____
Name of successor caretaker: _____
Do you want to pay the caretaker? Yes No
If yes, please indicate amount \$ _____

G. Who do you want as a **contingent beneficiary** if all percentage beneficiaries from Section B above predecease you? *If nothing is specified by you, the default language is that distributions will take place to your “heirs at law” (lineal descendants).*

Family member(s) Friend(s) Charitable Organization Other

If you elected an option above, please provide names and percentages for each beneficiary below.

PART IV – ASSET INFORMATION

REAL ESTATE

Address	How Title Held
1.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
3.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
If property is only in the name of one of you do you wish to make it community property before transferring it into the trust?	
	<input type="checkbox"/> Yes <input type="checkbox"/> No

CASH (SAVINGS, CHECKING, MONEY MARKET, CD'S)

Name & Address of Institution/ Last 4 Digits of Account No.	Type of Account
1.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
3.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
4.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
5.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint

BROKERAGE ACCOUNTS

R= Retirement Account (401k, IRA, etc.)
NR= Non-Retirement Account (i.e brokerage or investment account)

Brokerage Account, Last 4 Digits of Account No. and Type of Account		How Title Held
1.	<input type="checkbox"/> R <input type="checkbox"/> NR	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.	<input type="checkbox"/> R <input type="checkbox"/> NR	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
3.	<input type="checkbox"/> R <input type="checkbox"/> NR	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
4.	<input type="checkbox"/> R <input type="checkbox"/> NR	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint

STOCKS/BONDS/TREASURIES

Stock/Bond/Treasuries and Last 4 Digits of Account No.	No. of Shares	How Title Held
1.		<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.		<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
3.		<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
4.		<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint

ACCOUNTS & NOTES RECEIVABLE

Name of Borrower	Secured?	Who is Note Payable To?	Current Outstanding Balance
1.			
2.			

BUSINESS INTERESTS (EXAMPLE: LLC'S, GENERAL PARTNERSHIPS, CORPORATION, SOLE PROPRIETORSHIP)

Business Name	Type	% Owned	How Title Held
1.			<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.			<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint

MAJOR TANGIBLE PERSONAL PROPERTY VALUED IN ACCESS OVER \$150K (PER ITEM)

Asset	How Title Held
1.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
2.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint
3.	<input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint

Additional Information or Specific Questions:
