



alliance
planning & probate

ESTATE PLANNING WORKSHEET

We hold the information you provide in this worksheet in complete confidence, and use it for the sole purpose of analyzing your estate planning needs and designing your estate planning documents. Preparation of this worksheet is not mandatory prior to the initial appointment with us, but if we receive the completed worksheet prior to or at the time of your appointment, we can better and more completely advise you during the initial consultation.

During the initial appointment, we will discuss your specific goals and how to best prepare an estate plan to meet those goals while reducing or eliminating taxes and costs. We will provide an exact quote on fees for estate planning before you authorize completion of your estate plan.

Please remember this worksheet is just a starting point and you can certainly change your mind about your choices. Just do the best you can with it.

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ESTATE PLANNING WORKSHEET

Date: _____

Full Legal Name: _____

Date of Birth: _____ Phone Number: _____ Email Address: _____

Primary Address (including county):

Secondary Address: (if any)

What are your motivations for considering estate planning? *(Select one or more)*

- Probate avoidance
- Guardianship for minor children
- Business or farm planning
- Federal estate tax planning
- Other: _____

How soon would you like to complete planning? Is there a specific deadline, such as an upcoming trip, surgery, etc.? _____

Are you married? If so, please list the full legal name of your spouse:

Please list the full legal name and date of birth for each child:

Do you want your children's (or other beneficiaries) assets to be kept in trust until a certain age? Consider percentage distributions such as (for example), when you child reaches the age of 22 or graduates from an accredited institution of higher learning, whichever happens first, the child receives 1/3 of the trust property. When the child reaches the age of 25, the child receives 1/2 of the then remaining trust property. When the child reaches the age of 30, the child receives all of the then remaining trust property. As long as the child has money in trust, the trustee can pay for the child's health, education, maintenance and support.

Who should serve as the **trustee** to manage assets for your child or children (or a special needs beneficiary) while the funds are in trust? Consider naming a primary and a back up. Give full legal names.

Who should serve as the **executor** of your estate? (this is the person that will pay bills, collect assets, etc.) Consider naming a primary and a back up. Give full legal names.

If you are living, but become incapable of handing your personal business affairs, who should manage your business while you are incapacitated? Consider naming a primary and a back up. (this is the **Power of Attorney**- please give full name, phone number, address and email address)

If you are living, but become incapable of making decisions about your health care, who should make your health care decisions while you are incapacitated? Consider naming a primary and a back up. (this is the **Health Care Power of Attorney**- please give full name, phone number, address)

If you are living, but become incapable of making decisions about your health care, and terminal and incurable, would you like to have all measures of life sustaining intervention, some life sustaining intervention, or palliative care only? (this is the **Living Will**)

If you are living, but become incapable of making decisions about your health care, and in a persistent vegetative state, would you like to have all measures of life sustaining intervention, some life sustaining intervention, or palliative care only? (this is also the **Living Will**)

Do you wish to be buried or cremated? Any special instructions?
