

(PAGE TWO) Estate Planning Information

The items below are intended to be items of discussion during your first consultation. They are being forwarded for you to consider before the initial consultation.

HEIRS

Child=s Full Name	Birth Date	Address and Phone # (if not at home)	Parents, (B)oth/ (H)usband/(W)ife
1. _____	____/____/____	_____	_____ B-H-W
		Tel _____	
2. _____	____/____/____	_____	_____ B-H-W
		Tel _____	
3. _____	____/____/____	_____	_____ B-H-W
		Tel _____	
4. _____	____/____/____	_____	_____ B-H-W
		Tel _____	

GUARDIAN – If you have a minor child(ren) (under the age of 18), the Guardian would be the persons you wish to raise the child(ren) upon the death of you and your spouse (if applicable). You can name co-guardians as well as alternates to these choices. Even if the parent of your child(ren) is an ex-spouse, you should still name a guardian.

Preferred Guardian: _____ Relation to you _____

Co/Alternate Guardian: _____ Relation to you _____

Co/Alternate Guardian: _____ Relation to you _____

EXECUTOR/TRUSTEE – If you are setting up a “revocable living trust”, a “children’s trust” inside the will or simply, a will, an executor and trustee have the function of gathering the assets and administering the terms of the trust or will. Usually the trustee and executor are the same persons. Again, you can name co-trustees/executors as well as alternates to these choices. The guardian can be the executor/trustee or you can name different persons.

Trustee/Executor: _____ Relation to you _____

Co/Alt. Trustee/Exec.: _____ Relation to you _____

Co/Alt. Trustee/Exec.: _____ Relation to you _____

HEALTH CARE POWER OF ATTORNEY/LIVING WILL These documents are usually discussed at an initial consultation. Generally, these documents deal with your desires if you become “terminally ill”. You can appoint the person(s) you want to be contacted and to make decisions for you regarding your health care if you and your spouse, if applicable, are incapacitated. You and your spouse, if applicable, can name different persons. These matters will be discussed in much greater detail. The address/telephone info for those you name is needed, unless you have named your children (listed above).

Name:	Address:	Telephone:
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1. _____

2. _____

For Spouse (if different):

1. _____

2. _____