

**PERSONAL AND FINANCIAL ORGANIZER
FOR YOUR ESTATE PLAN (Married Couple)**

1 GENERAL INFORMATION DATE:

Husband (First, Middle, Last) Soc. Sec. No. Date of Birth

Wife (First, Middle, Last) Soc. Sec. No. Date of Birth

Home Address (Number, Street) City State Zip

Mailing Address If Different From Above (Number, Street) City State Zip

Home Phone Cell Phone Husband's Work Phone Wife's Work Phone

Husband's Employer Husband's Occupation Husband's E-Mail Address

Wife's Employer Wife's Occupation Wife's E-Mail Address

2 PERSONAL INFORMATION

1. Are you a U.S. citizen?
2. Do you have a will or trust now?
3. Do you expect to receive money from
(circle all that apply):
If so, approximately how much?
4. Please list names and ages of all children
(Please note if adopted or a stepchild,
and include deceased children)
5. Do any dependents need special care?
If so, what is their age and relation?
6. How many grandchildren do you have?

	HUSBAND		WIFE	
1. Are you a U.S. citizen?	Yes	No	Yes	No
2. Do you have a will or trust now?	Yes	No	Yes	No
3. Do you expect to receive money from (circle all that apply):	Gift	Inheritance	Gift	Inheritance
	Lawsuit	Other	Lawsuit	Other
If so, approximately how much?	\$ _____	\$ _____	\$ _____	\$ _____
4. Please list names and ages of all children (Please note if adopted or a stepchild, and include deceased children)	_____		_____	
	_____		_____	
	_____		_____	
	_____		_____	
	_____		_____	
	_____		_____	
5. Do any dependents need special care?	Yes	No	Yes	No
If so, what is their age and relation?	_____		_____	
6. How many grandchildren do you have?	_____		_____	

3 TRUST DECISIONS: YOUR LIVING TRUST TEAM

Trustee(s)--Manages your trust now and is usually you and your spouse.

Back-up Trustee(s)-- Steps in when the trustee(s) designated above become disabled or die. A husband and wife typically appoint each other as their #1 choice and adult children, trusted friends or relatives, or a corporate or bank trustee for their #2 and #3 choices.

#1 Choice
Name, Phone, and
Address

#2 Choice
Name, Phone,
and Address

#3 Choice
Name, Phone,
and Address

4 FINANCIAL POWER OF ATTORNEY

Person who will take care of your financial needs if you become incapacitated. Your spouse is usually your first agent and you need to appoint at least one backup agent.

#1 Choice
Name, Phone, and
Address

#2 Choice
Name, Phone,
and Address

#3 Choice
Name, Phone,
and Address

	HUSBAND	WIFE

5 MINOR CHILDREN

Guardians For Minor Children--Responsible adult who will raise your minor children if you cannot.

	HUSBAND	WIFE
#1 Choice Name, Phone, and Address		
#2 Choice Name, Phone, and Address		

6 HEALTH CARE DECISIONS

Health Care Agent(s)-- Steps in to make health care decisions for you if you cannot make health care decisions for yourself. A husband and wife typically appoint each other as their #1 choice and adult children or relatives for their #2 and #3 choices.

	HUSBAND	WIFE
#1 Choice Name, Phone, and Address		
#2 Choice Name, Phone, and Address		
#3 Choice Name, Phone, and Address		

PART I

DISTRIBUTIONS DURING THE LIFETIME OF MY WIFE

- Please list any gifts to any beneficiaries you want made immediately upon your death, even if your wife survives you.
- _____
- _____
- FOR ESTATES LESS THAN \$1,000,000 AND NO CHILDREN FROM A PRIOR MARRIAGE.** The balance of my property is to be held in trust for my wife, with the power to give the property to anyone she desires. This option allows your wife to give your property to a new spouse, or the power to disinherit your heirs (a concern if you have children from a prior marriage).
- FOR ESTATES OVER \$1,000,000 OR IF YOU HAVE CHILDREN FROM A PRIOR MARRIAGE.** The balance of my property is to be held in trust for my wife's support during her lifetime. At my wife's death, the balance of my share of the trust will be distributed to the beneficiaries listed in "DISTRIBUTIONS AFTER THE DEATH OF MY WIFE" below rather than according to my spouse's desires. This option exempts \$1,000,000 of your share of the trust from estate taxes at your wife's death, and protects your beneficiaries from being disinherited.

PART II

DISTRIBUTIONS AFTER THE DEATH OF MY WIFE

SPECIFIC GIFTS. Please list any gifts of a specific dollar amount or of a specific item.

RESIDUE. The residue of my share of the trust shall be distributed as follows:

- EQUAL SHARES FOR CHILDREN.** Divided into separate shares for each of my children.
- OTHER.** Divided into separate shares for following beneficiaries in the amount or share shown below:
- | NAME | AMOUNT/SHARE |
|-------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

TIMING OF DISTRIBUTIONS. Each beneficiary is to receive their share as follows:

- OUTRIGHT DISTRIBUTION.** Each beneficiary is to receive their share as soon as they reach the age of: _____.
- DISTRIBUTED IN STAGES.** While under age 35, each beneficiary is entitled to any part of his or her share needed for his or her support, health, maintenance and education as determined by the trustee, with the balance distributed outright in equal installments at age 25, 30, and 35. Recommended when children are young.
- CREDITOR PROTECTION TRUST FOR CHILDREN AND THEN TO GRANDCHILDREN.** Each child is entitled to receive any part of their share of my trust needed for their health, support, maintenance, and education during their entire lifetime. At the child's death, the balance of his or her share of the trust is to be distributed to the child's children (my grandchildren). Although your children have access to the trust, the value of the trust up to your generation-skipping transfer tax exemption will escape the estate tax at their deaths; and none of it can be reached by their creditors during their lifetimes. Recommended if you want to make sure your estate is eventually distributed to your grandchildren rather than your children's spouses.

PART I

DISTRIBUTIONS DURING THE LIFETIME OF MY HUSBAND

Please list any gifts to any beneficiaries you want made immediately upon your death, even if your husband survives you.

FOR ESTATES LESS THAN \$1,000,000 AND NO CHILDREN FROM A PRIOR MARRIAGE. The balance of my property is to be held in trust for my husband, with the power to give the property to anyone he desires. This option allows your husband to give your property to a new spouse, or the power to disinherit your heirs (a concern if you have children from a prior marriage).

FOR ESTATES OVER \$1,000,000 OR IF YOU HAVE CHILDREN FROM A PRIOR MARRIAGE. The balance of my property is to be held in trust for my husband's support during his lifetime. At my husband's death, the balance of my share of the trust will be distributed to the beneficiaries listed in "DISTRIBUTIONS AFTER THE DEATH OF MY HUSBAND" below rather than according to my spouse's desires. This option exempts \$1,000,000 of your share of the trust from estate taxes at your husband's death, and protects your beneficiaries from being disinherited.

PART II

DISTRIBUTIONS AFTER THE DEATH OF MY HUSBAND

SPECIFIC GIFTS. Please list any gifts of a specific dollar amount or of a specific item.

RESIDUE. The residue of my share of the trust shall be distributed as follows:

EQUAL SHARES FOR CHILDREN. Divided into separate shares for each of my children.

OTHER. Divided into separate shares for following beneficiaries in the amount or share shown below:

NAME

AMOUNT/SHARE

TIMING OF DISTRIBUTIONS. Each beneficiary is to receive their share as follows:

OUTRIGHT DISTRIBUTION. Each beneficiary is to receive their share as soon as they reach the age of: _____.

DISTRIBUTED IN STAGES. While under age 35, each beneficiary is entitled to any part of his or her share needed for his or her support, health, maintenance and education as determined by the trustee, with the balance distributed outright in equal installments at age 25, 30, and 35. Recommended when children are young.

CREDITOR PROTECTION TRUST FOR CHILDREN AND THEN TO GRANDCHILDREN. Each child is entitled to receive any part of their share of my trust needed for their health, support, maintenance, and education during their entire lifetime. At the child's death, the balance of his or her share of the trust is to be distributed to the child's children (my grandchildren). Although your children have access to the trust, the value of the trust up to your generation-skipping transfer exemption will escape the estate tax at their deaths, and none of it can be reached by their creditors during their lifetimes. Recommended if you want to make sure your estate is eventually distributed to your grandchildren rather than your children's spouses.

1. Do you own a **home** or any **other real estate**?

Description and Location	Titled in whose name	Purchase Price	Market Value	(-) Mortgage	(=) Equity
Total Net Value					

2. Do you own any **other titled property** such as a car, boat, etc.?

Description	Titled in whose name	Market Value	(-) Mortgage	(=) Equity
Total Net Value				

3. Do you have any **checking accounts**?

Name of Bank	Titled in whose name	Approx. Balance
Total Value		

4. Do you have any **interest bearing accounts** (savings, money market) and/or **CDs**?

Name of Bank	Titled in whose name	Approx. Balance
Total Value		

5. Do you own any **stocks, bonds or mutual funds** (including company stock)?

# of Shares	Name of Security	Titled in whose name	Purchase Price	Current Value
Total Value				

6. Do you have any retirement plans such as **profit sharing, IRAs, 401(k), or pension plans**?

Description/Location	Beneficiary	Current Value
Total Value		

7. Do you have any **life insurance** policies and/or **annuities**?

Name of Company	Policy Owner	1st Beneficiary	2nd Beneficiary	Death Benefit
Total Value				

8. Does anyone owe you money?

Description	Approx. Value	
Total Value		

9. Do you have any **special items of value** such as coin collections, antiques, jewelry, etc.?

Description	Approx. Value	
Total Value		

10. What is the approximate total value of all your remaining **personal property**--whatever you own that has not been included above? (clothes, furniture, etc.) Just estimate \$ _____

11. Do you have any **debts** other than mortgage(s) and loans listed above (credit cards, personal loans, etc.)?

Amount owed

Total Debt	

12. Total value of everything you (and your spouse) own (add totals of 1 thru line 10 above) \$ _____

13. Total amount you (and your spouse) owe (total of line 11 above) \$ _____

14. Subtract line 13 from line 12. **TOTAL NET ESTATE VALUE = \$**

15. Do you have a **safe deposit box**?

Location

Titled in whose name

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QUESTIONS TO ASK YOUR ATTORNEY ABOUT YOUR ESTATE PLAN

For a free 20 minute consultation to discuss your individual estate plan and answer any questions you may have, please contact us.

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