

ESTATE PLANNING INFORMATION

Your Full Legal Name:

Your *Preferred* Name on Documents:

Social Security Number:

Date of Birth:

Are you a U.S. Citizen or Resident Alien:

Home Address:

Phone Number:

Email (please print clearly):

Marital Status-(Circle one): Single Married Divorced Widowed

If married, your spouse's name:

***If you have a (pre or post) marital agreement, provide a complete copy to our office for your file.**

Were you ever married before: YES or NO If yes, former spouse's name:

Did your former spouse die? YES or NO or did you obtain a divorce? YES or NO

Do you have any living children: YES or NO If yes, what are their names, birth dates, addresses and phone #:
(if any were adopted, provide a copy of the Court Order)

If any of your children are minors, who would you nominate as Guardian and Alternate Guardian?

names relationship to you addresses phone #:

Guardian:

Alternate Guardian:

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Do you own any real estate (including your home): YES or NO
(if yes, please bring copies of all deeds to our office for your file)

What is the complete address of each property?

Is there a mortgage (including an equity line) on any of your properties? YES or NO

Who is the borrower? *(Please bring a recent bill to our office for your file)*

Do you have a safe deposit box: YES or NO If yes, what is the **box #** _____

Name and location of bank: Who has access to the box:

Do you have any bank, credit union, retirement and/or brokerage accounts: YES or NO

If yes, how are each of your accounts titled (Individually, husband and wife, etc.)?

Have you named a beneficiary for each account? If so, who is listed?

What is the total approximate value of all accounts: \$ _____

Do you have life insurance: YES or NO

Name of company(s):	Policy #	Face value \$	Beneficiary	Policy Owner
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Do you own a portion/all of a privately held corporation, LLC or partnership YES or NO

What is the name of each entity:

Do you have any digital assets(crypto currency, NFT's, etc.)?

Do you have any other assets of value not listed above, including any current debts owed to you?

If so, please list:

Have you made arrangements for the disposition of your remains? YES or NO

If yes, with whom: name address phone #

Please describe how your property will be distributed upon your death, and to whom (please include the relationship of the beneficiary to you and their address and phone number, if not listed above):

If you would like to make a **charitable gift**, please list the charity's name, purpose of your gift and the amount of each charitable bequest:

What is the name and phone number of the person that prepares your tax returns?

Who are your choices for Personal Representative (formerly known as Executor)?

Name	Relationship	Address	Phone #
Primary:			
Successor:			
Alternate:			

Do you currently have any signed estate planning documents (e.g. Will, Living Will, Durable Power of Attorney, Designation of Health Care Surrogate, and/or Trust Agreement)? If so, please bring a copy to your appointment. If not, feel free to ask about any questions you may have about any of the documents listed above.

Have you made a list of all internet accounts (banking, social media, etc.), with your user id and passwords? Your list should be available to a trusted person upon your death.