

ESTATE PLANNING/WILL INFORMATION FORM

1. You: _____ Birth Date: _____
Last Name First Middle

Spouse: _____ Birth Date: _____
Last Name First Middle

Children: _____ Birth Date: _____
Last Name First Middle

_____ Birth Date: _____
Last Name First Middle

_____ Birth Date: _____
Last Name First Middle

Mailing Address: _____ Phone: _____
City/State/Zip: _____

2. Do you have a will now? _____ If so, when prepared? _____ Where? _____

3. Have you been married before? _____ If so, were children born of that marriage? _____
If so, list their names and ages. _____

4. Has your spouse been married before? _____ If so, were children born of that marriage? _____
If so, list their names and ages. _____

5. Are both spouses U.S. Citizens? _____ Is either spouse a veteran? _____

6. Do you wish to be cremated or buried? _____ Are there any other
specific requests regarding this? _____
Do you have a prepaid plan? _____ If so, what funeral home is the prepaid plan with?

7. What are your general goals for your estate on your death (please rank).
_____ Support Surviving Spouse
_____ Support children
_____ Minimize taxes and probate costs
_____ Charitable gifts
_____ Support other family members
_____ Other (please describe) _____

- a. What are your favorite charities? _____
- b. Have you given to any charities: _____
- c. If no heir survives you, do you have favorite charities to include? _____

8. Are any of your heirs or beneficiaries disabled and/or receiving government benefits?

9. Is there personal or real property you want to specifically mention in your will and leave to someone other than those who will receive the balance of your estate (family heirlooms, collections, etc.)? _____

10. How do you wish to distribute the balance of your estate not disposed of by paragraph 9, above? _____

11. Who do you want to be your executor/personal representative?
1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

12. If you have minor children and die at the same time as your spouse, who do you want to have act as guardian of your children?
1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

13. Who do you want to have act as trustee of a trust for your children or other beneficiaries?
1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____

14. Apart from allowing the trustee to pay whatever is required toward the health, education and support needs of your children while they are under age 19, at what age(s) do you want your children to receive the trust principal? One approach is to pay it in three installments (i.e., 1/3rd at age 21, half of the balance at age 25, and the balance at age 30). Please state the ages and percentage to be distributed. _____

15. We recommend a Health Care Directive and Financial Durable Power of Attorney. Do you presently have:
General Power of Attorney: _____ Living Will: _____
Durable Power of Attorney: _____ Medical Directive: _____

16. In the event of your incapacity, who would you name to act on your behalf for medical decisions?
1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____
Telephone #: _____ Telephone #: _____

17. In the event of your incapacity, who would you name to act on your behalf for financial decisions?
1st Choice: _____ 2nd Choice: _____
Address: _____ Address: _____
City/State/Zip: _____ City/State/Zip: _____
Telephone #: _____ Telephone #: _____

18. (a) Estate taxes are an important consideration in estate planning. Each U.S. citizen is permitted to transfer tax free up to \$11,700,000 (2021 exemption amount as set in the 2017 Tax Cuts and Jobs Act, which is indexed for inflation) at death. Because the estate tax computation usually excludes amounts passing to the surviving spouse, it is often advantageous to use up as much of your tax credit upon your death in order to minimize the tax impact to your surviving spouse at his/her death. A simple way to determine whether you are a candidate for such planning is to determine whether your net assets (including life insurance proceeds) *combined with those of your spouse* equal or exceed \$23,400,000. Please let us know.

(b) If your net assets *combined with those of your spouse* are likely to be equal or exceed the exemption amount upon your death, then you should consider the estate tax (i.e., The estate tax will take roughly 1/3 (or more) of the amount exceeding the exemption amount which does not go to either charity or a surviving spouse). To provide you with a closer analysis of the estate tax prospects and your options, you need to provide a complete list of all assets you own that will transfer by reason of your death.

(c) Beneficiary designations on insurance policy, pensions, and IRA's trump what is written in a will. Please check with your plan providers and bring all current beneficiary designations with you or you will need to do so shortly after we get started.

WE ALSO ASK THAT YOU BRING IN COPIES OF ALL REAL ESTATE DEEDS AT THE TIME OF YOUR APPOINTMENT.

| Asset | How Titled/Who Owns? | Liens | Net Value |
|-------|----------------------|-------|-----------|
|-------|----------------------|-------|-----------|

Real Property

Personal Property

Stocks, Bonds & Investments

| Insurance | Who Owns? | Face Value | Named Beneficiary |
|-----------|-----------|------------|-------------------|
|-----------|-----------|------------|-------------------|

Pensions/IRA

Virtual Currency
