

**Estate Planning – Preparation Form**

Thank you for taking the time to plan for the future of your love ones, the transfer of your property and assets, and creating a living trust and will that will accomplish your desires.

I am pleased to assist you in protecting all you have earned and to make sure it passes to your beneficiaries as a blessing.

**ESTATE PLANNING QUESTIONNAIRE**

Please take some time to become familiar with the terms of estate planning at your leisure.

<https://www.investopedia.com/terms/t/trust.asp>

Prepare for our meeting by supplying this information ahead of time:

**Name of Living Trust**

What is the name you are considering for your trust? You can be creative. Commonly, a trust is simply the names of the trustors with the 'family'. The John and Sally Smith Family Living Trust 2021

**Purpose of Living Trust**

What is the purpose of this trust? Common answers include: to avoid Probate and court involvement; Pass my property to heirs without fees and taxation; Provide for children and grandchildren in the future.

---

---

Do you want the ability to change this trust? \_\_\_\_\_ Or, is it irrevocable and set in stone? \_\_\_\_\_

**About You and Your Family - Hover over field with cursor for tips in each field.**

Tell me about You as the Trustor / Settlor of your living trust or of your Will.

Your Legal Name: \_\_\_\_\_ Spouse: \_\_\_\_\_

Address/Domicile: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse Social Security: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Are you a U.S. Citizen? \_\_\_\_\_ If not, country of Citizenship: \_\_\_\_\_

Spouse Phone \_\_\_\_\_

**Estate Planning – Preparation Form**

Is Spouse a U.S. Citizen? \_\_\_\_\_ If not, country of Citizenship: \_\_\_\_\_

Do you currently have a will? \_\_\_\_\_ Do you have a living trust? \_\_\_\_\_ Amendments? \_\_\_\_\_

Prior Marriages: \_\_\_\_\_

Name of Former Spouse: \_\_\_\_\_

Marriage Ended In: Death \_\_\_\_\_ Divorce \_\_\_\_\_, Year \_\_\_\_\_

County: \_\_\_\_\_

**Child 1** Full Legal Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gender: \_\_\_\_\_ Child of Prior Marriage? \_\_\_\_\_, Which Spouse?

Was this child Adopted: \_\_\_\_\_

**Child 2** Full Legal Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gender: \_\_\_\_\_ Child of Prior Marriage? \_\_\_\_\_, Which Spouse?

Was this child Adopted: \_\_\_\_\_

**Child 3** Full Legal Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gender: \_\_\_\_\_ Child of Prior Marriage? \_\_\_\_\_, Which Spouse?

Was this child Adopted: \_\_\_\_\_

**Child 4** Full Legal Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gender: \_\_\_\_\_ Child of Prior Marriage? \_\_\_\_\_, Which Spouse?

**Estate Planning – Preparation Form**

Was this child Adopted: \_\_\_\_\_

**Estate Planning – Preparation Form**

**Management of Your Estate** (Executor / Trustee)

Who will manage your estate right now? (common answer is Myself, My spouse and I) This is known as the current Trustee.

\_\_\_\_\_

Choose who will manage your estate after your death? (Successor Trustee)

**Spouse:** \_\_\_\_\_

**Successor Trustee #1** \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

**Successor Trustee #2** \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Do you want the persons named above to serve as co-trustees? \_\_\_\_\_

Note: I do not recommend co-trustees.

**Guardians of Minor Children**

A guardian is a responsible adult who will raise and care for your children if something happens to both parents. Choose the person you want as guardian; you do not have to choose his/her spouse as an alternate if you prefer another person.

Same as Executors / Trustees Above? \_\_\_\_\_

**Guardian #1** \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

**Guardian #2** \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

**Estate Planning – Preparation Form**

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

**Distribution of Your Estate**

**Beneficiaries**

Whom do you want to receive your estate after your death? \_\_\_\_\_

To your children in equal shares? \_\_\_\_\_ At Age: \_\_\_\_\_

Note: For any child under the age specified above, trust funds would only be available to the child for health, education, maintenance, and support at the discretion of your trustee. Any funds remaining when the child reaches that age will be distributed outright. The minimum age is 18; we recommend age 25.

Primary Beneficiaries (if not to your children in equal shares)

It is usually easiest to indicate percentages.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Amount/Percentage: \_\_\_\_\_% or fixed amount \$\_\_\_\_\_.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Amount/Percentage: \_\_\_\_\_% or fixed amount \$\_\_\_\_\_.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Amount/Percentage: \_\_\_\_\_% or fixed amount \$\_\_\_\_\_.

Notes: \_\_\_\_\_

**Special Gifts**

Do you want to leave any specific items to anyone? \_\_\_\_\_

These can be personal property (e.g. your ring to your daughter), real property (e.g. your house to your brother), or cash gifts. Most families choose not to be this specific in their giving. If yes, fill out below section.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Amount \$\_\_\_\_\_. Description of Gift: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**Estate Planning – Preparation Form**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Amount \$ \_\_\_\_\_. Description of Gift: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**Disinheritance**

Do you wish to specifically disinherit someone? \_\_\_\_\_

Please indicate names and relationships of those you wish to disinherit along with the reasons for your

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason: \_\_\_\_\_

**Durable Power of Attorney (Financial)**

A durable power of attorney is a document that gives another person (your “Agent”) the power to make certain financial and property decisions for you if you are unable to do so because of incapacity. In order of preference, please list your desired Agents. We recommend that you have *at least one* alternate.

**HUSBAND (if not applicable, then enter "n/a")**

Spouse: \_\_\_\_\_

Alternate Person #1 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Alternate Person #2 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

When do you want the power to be effective? Now? \_\_\_\_\_ Only On Your Incapacity \_\_\_\_\_

*Single: we recommend choosing “only on your incapacity;” Married: we recommend choosing “Now”*

**Estate Planning – Preparation Form**

**WIFE (if not applicable, then enter "n/a")**

Spouse: \_\_\_\_\_

Alternate Person #1 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

—

Alternate Person #2 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

When do you want the power to be effective? Now? \_\_\_\_\_ Only On Your Incapacity \_\_\_\_\_

*Single: we recommend choosing "only on your incapacity;" Married: we recommend choosing "Now"*

**Advance Health Care Directive**

An advance directive is a document that gives another person (your "Agent") the power to make certain health care decisions for you if you are unable to do so because of incapacity. In order of preference, please list your desired Agents. We recommend that you have *at least one* alternate.

**HUSBAND**

Spouse: \_\_\_\_\_

Alternate Person #1 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

—

Alternate Person #2 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

When do you want the power to be effective? Now? \_\_\_\_\_ Only On Your Incapacity \_\_\_\_\_

*Single: we recommend choosing "only on your incapacity;" Married: we recommend choosing "Now"*

Would you like to direct how to dispose of your remains? \_\_\_\_\_

\_\_\_\_\_ Burial \_\_\_\_\_ Cremation Desired Location: \_\_\_\_\_

**Estate Planning – Preparation Form**

By default, I include a provision that explains that you do not want your life to be artificially prolonged (e.g., by feeding tube, life support, etc.) beyond natural limits.

Do you want this provision? \_\_\_\_\_

Do you want to donate your organs? \_\_\_\_\_

Do you have any special wishes regarding life support, funeral, etc.? \_\_\_\_\_

**WIFE**

Spouse: \_\_\_\_\_

Alternate Person #1 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

—

Alternate Person #2 - Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

When do you want the power to be effective? Now? Only On Your Incapacity

*Single: we recommend choosing "only on your incapacity;" Married: we recommend choosing "Now"*

Would you like to direct how to dispose of your remains?

\_\_\_\_\_ Burial    \_\_\_\_\_ Cremation    Desired Location:

By default, I include a provision that explains that you do not want your life to be artificially prolonged (e.g., by feeding tube, life support, etc.) beyond natural limits.

Do you want this provision? \_\_\_\_\_

Do you want to donate your organs? \_\_\_\_\_

Do you have any special wishes regarding life support, funeral, etc.? \_\_\_\_\_



**Estate Planning – Preparation Form**

**Asset Information**

Real Estate Addresses

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Business Interests (Corporation, LLC, Partnership, Etc.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Please Bring Copies of the Following Documents**

(If you have them. If you do not have them or they do not apply to you, it's not a problem):

- Your current Will, Trust, Power of Attorney, or Advance Directive
- Business or Partnership agreements (Corporate / LLC Articles)
- Any prenuptial agreement or other property agreement to which you are a party.

**Estate Planning – Preparation Form**