

Describe special needs of family members (if any)

Do you have a safe or safe deposit box? yes no
If yes, where is it located?

Do you have existing estate planning documents (i.e. wills, trusts, power of attorney or health care directives)?
If yes, please provide copies. Client: yes no Spouse: yes no

Anticipated inheritance:	Estimated amount	When anticipated
Recipient:	\$	

Would you like assets to be distributed outright to your child(ren)? yes no
Or

Would you like assets to be held in trust for your child(ren)? yes no

If assets are held in trust for your child(ren), at what age(s) would you like the trust assets distributed?

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

I would prefer the trust assets to be distributed as follows: _____

If no one in your immediate family is around to receive the ultimate disposition of your assets, to whom would you like them to be distributed? (i.e. nieces and nephews, siblings, charitable organizations) _____

Accountant: _____

Phone # _____

Company Name and Address:

Financial Planner
Name and Address:

Phone # _____

Banker: _____

Phone # _____

Company Name and Address:

Life Insurance Agent: _____

Phone # _____

Company Name and Address:

Other Advisor: _____

Phone # _____

Company Name and Address:

Guardians

Who should be the guardian of your minor children? A guardian has physical and legal control over your children until they reach the age of 18.

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Personal Representative - Client

Who should be the Personal Representative (“Executor”) of your estate? A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Trustee – Client

If a trust is appropriate to include in your estate plan, who should be the Trustee? A Trustee is the person or entity who is responsible for managing the assets placed into the trust. A Trustee manages the assets for your children or other beneficiaries until they reach a specified age. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your Trustee(s).

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Power of Attorney - Client

A Power of Attorney allows you to grant another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name. The person (or persons) you designate is/are called “Attorney(s)-in-Fact.” Who would you name as your Attorney(s)-in-Fact?

First Choice
Name, Relationship, Address, Phone

Second Choice
Name, Relationship, Address, Phone

Third Choice
Name, Relationship, Address, Phone

Health Care Directive – Client

A Health Care Directive allows you to appoint someone to make health care decisions for you and/or state your preferences for health care in the event you are unable to communicate them. Who would you designate as your “Health Care Agent?”

First Choice

Name, Relationship, Address, Phone

Second Choice

Name, Relationship, Address, Phone

Third Choice

Name, Relationship, Address, Phone

Personal Representative – Spouse (if different from above)

Who should be the Personal Representative (“Executor”) of your estate? A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

First Choice

Name, Relationship

Second Choice

Name, Relationship

Third Choice

Name, Relationship

Trustee – Spouse (if different from above)

If a trust is appropriate to include in your estate plan, who should be the Trustee? A Trustee is the person or entity who is responsible for managing the assets placed into the trust. A Trustee manages the assets for your children or other beneficiaries until they reach a specified age. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your Trustee(s).

First Choice

Name, Relationship

Second Choice

Name, Relationship

Third Choice

Name, Relationship

Power of Attorney - Spouse (if different from above)

A Power of Attorney allows you to grant another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name. The person (or persons) you designate is/are called "Attorney(s)-in-Fact." Who would you name as your Attorney(s)-in-Fact?

First Choice Name, Relationship, Address, Phone	Second Choice Name, Relationship, Address, Phone	Third Choice Name, Relationship, Address, Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Health Care Directive – Spouse (If different from above)

A Health Care Directive allows you to appoint someone to make health care decisions for you and/or state your preferences for health care in the event you are unable to communicate them. Who would you designate as your "Health Care Agent?"

First Choice Name, Relationship, Address, Phone	Second Choice Name, Relationship, Address, Phone	Third Choice Name, Relationship, Address, Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

A funeral is not a day in a lifetime . . . but a lifetime in a day

For the average family, there are approximately 60 decisions to be made. Someone needs to:

Notify:

- Doctor
- Coroner
- Funeral Director
- Cemetery or Memorial Park
- Clergy
- Pallbearers
- Insurance agents
- Unions or Fraternal Organizations
- Newspapers
- Organist

Select:

- Cemetery property
- Funeral services
- Casket or urn
- Clothing and music
- Floral arrangements
- Thank you cards
- Time and place for funeral
- Time and place for visitation
- Memorial folders
- Markers and inscriptions
- Readings for opening ceremony
- Video or audio for service
- Memorial donations or flowers

Provide and/or answer:

- Vital Statistics about the deceased (about 20 questions)
- Addresses for all people who must be notified
- Arrangements for out of town visitors
- Jewelry/glasses
- Clothing for deceased
- Information for the eulogy

Arrangements must be made to pay for the following items immediately:

- Doctor
- Hospital
- Nurses
- Prescriptions
- Ambulance
- Funeral and obituaries
- Cemetery and internment fees
- Clergy, organist, soloists
- Florist
- Clothing
- Transportation
- Luncheon

Locate and prepare:

- Pictures and memorabilia
- Sign all legal paperwork
- Discharge papers (if veteran)
- Luncheon details – what/where/who
- Payment for services
- Transportation for family and guests
- Religious and fraternal items

In addition:

- Answering sympathetic phone calls
- Greeting friends and relatives when they call or drop by