

ESTATE PLANNING CHECKLIST

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INSTRUCTIONS: Please complete the following form. If you are unsure what to put or whether a question applies to your situation, you may leave it blank. Once you have completed the form, please mail, fax, e-mail, or drop the form by our office. A member of our firm will be in contact with you to discuss the form.

CLIENT INFORMATION

Your Full Legal Name: _____

Your Spouse's Full Legal Name: _____

Street Address: _____

City, State, and Zip: _____

County of Residence: _____

Telephone: Home: _____ Work: _____ Cell: _____

Facsimile: _____

E-Mail(s): _____

Marital status: _____ Date of Marriage: ____ / ____ / ____

Date of birth: Client ____ / ____ / ____ Spouse ____ / ____ / ____

Citizenship: Client _____ Spouse _____

Have you or your spouse been married previously? Yes No

Have you or your spouse ever resided in Alaska, Wisconsin, Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Texas or Washington? (Circle the state) If so, please provide the dates of residence in each of the above states: _____

Do you have current Wills? Yes No
 If yes, please bring all originals to our appointment.

FAMILY INFORMATION

Please list the legal names and birthdays of all of your children, and whether they have children of their own. Please also include the names of any deceased children and whether they had any children.

<u>Husband's Children</u>	<u>Date of Birth</u>	<u># and Age of Grandchildren</u>
_____	____ / ____ / ____	_____
_____	____ / ____ / ____	_____
_____	____ / ____ / ____	_____
<u>Wife's Children</u>	<u>Date of Birth</u>	<u># and Age of Grandchildren</u>
_____	____ / ____ / ____	_____
_____	____ / ____ / ____	_____
_____	____ / ____ / ____	_____

ESTATE PLANNING INFORMATION

A **personal representative, or executor**, is the person who manages your assets after your death, coordinates with the probate court, and distributes your estate according to your Will. List **up to** three people you would like to be your personal representative, in the order in which you would like them to serve:

<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1. _____	_____	_____

2. _____	_____	_____

3. _____	_____	_____

A **trustee** is the person who will manage assets after your death for any minor children, grandchildren, or disabled beneficiaries of your estate, or, for your surviving spouse, as applicable. A trustee may also be appointed to manage your assets during your own lifetime in certain circumstances. List **up to** three people you would like to be your trustee, in the order in which you would like them to serve:

<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1. _____	_____	_____

2. _____	_____	_____

3. _____

A **guardian** is the person who will take care of your minor children, after your death. List **up to** three people you would like to be guardian of your children, in the order in which you would like them to serve:

	<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1.	_____	_____	_____ _____
2.	_____	_____	_____ _____
3.	_____	_____	_____ _____

Exclude a former spouse? Yes No If yes, Name: _____

A **General Durable Power of Attorney** authorizes someone to act on your behalf for financial and medical decisions during your lifetime. List **up to** three people you would like to act on your behalf if you are found legally incompetent, in the order in which you would like them to serve:

	<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1.	_____	_____	_____ _____
2.	_____	_____	_____ _____
3.	_____	_____	_____ _____

An **Advance Directive**, also called a "Living Will" is a document in which you specify in advance whether or for how long you would like life support and artificial nutrition and hydration continued under certain circumstances. Do you want a living will? Yes No

If yes, who would you like to be your *health care agent* to make medical decisions if you are unable? _____

Who would you like to be your *backup health care agent*?

The beneficiaries who are designated on your various investments, retirement accounts, and life insurance policies should be coordinated with your Wills. Do you have retirement accounts, life insurance policies, annuities, or other accounts that need beneficiary designation forms directing that these assets should pass upon your death in harmony with you Will? Yes No

Please note if any special family circumstances are applicable:

Do you want to disinherit anyone? Yes No
Is anyone likely to contest your Will? Yes No
Is anyone on governmental assistance? Yes No
Does anyone have special needs, disabilities, or addictions? Yes No
Will anyone need to enter a nursing home soon? Yes No
Does anyone have creditor problems? Yes No
Is divorce a concern for anyone? Yes No
Other: _____

Please list any special financial circumstances:

Continuing obligations from a prior divorce? Yes No
Prenuptial or other marital agreement? Yes No
Have you or your spouse ever filed gift tax returns? Yes No
Non-Georgia assets? Yes No
Oil, Gas, Mineral Interests? Yes No
Agricultural interests? Yes No
Water rights? Yes No
Time-share or vacation home? Yes No
Family business? Yes No
Are you the beneficiary of any existing trust? Yes No
Total combined estate close to or over \$5 million? Yes No
Do you have a long-term care policy? Yes No
If yes, what are the benefits payable? Yes No
Other: _____

DISTRIBUTION OF ESTATE:

1. Would you like to make gifts of specific assets under your Will? If so, please describe:

2. Please describe how you would like the rest your estate distributed.

3. If any of the above beneficiaries are deceased, who would you want to be your contingent beneficiary or beneficiaries?

4. The Will's trust provision allows your Personal Representative to hold the gift to any beneficiary in trust until he or she reaches age 25 (and this is strongly recommended). Please indicate if you would like the age of trust dissolution and outright distribution to be different.

5. Would you prefer to be buried or cremated?

6. Is there anything else you would like to tell us regarding what you want in your will?