

GQ LAW

financial solutions law firm
estate planning • tax • small business

ESTATE PLANNING BASIC INFORMATION WORKSHEET

HUSBAND OR CLIENT 1 FULL LEGAL NAME:

WIFE OR CLIENT 2 FULL LEGAL NAME:

STEP 1: FAMILY INFORMATION

CHILDREN OF THIS MARRIAGE:

NAME	M or F	DATE OF BIRTH	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CHILDREN OF HUSBAND OR CLIENT 1 PRIOR MARRIAGE:

NAME	M or F	DATE OF BIRTH	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CHILDREN OF WIFE OR CLIENT 2 PRIOR MARRIAGE:

NAME	M or F	DATE OF BIRTH	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

STEP 2: BENEFICIARIES

Who would you like as your beneficiaries?

(Identify all individual(s) you would like to inherit your estate)

SAME AS CHILDREN LISTED ON PAGE 1

BENEFICIARY #1 NAME: _____ PHONE # _____

RELATIONSHIP: _____

PERCENT % TO BE DISTRIBUTED (total must equal 100% among beneficiaries) _____

ADDRESS: _____

BENEFICIARY #2 NAME: _____ PHONE # _____

RELATIONSHIP: _____

PERCENT % TO BE DISTRIBUTED (total must equal 100% among beneficiaries) _____

ADDRESS: _____

BENEFICIARY #3 NAME: _____ PHONE # _____

RELATIONSHIP: _____

PERCENT % TO BE DISTRIBUTED (total must equal 100% among beneficiaries) _____

ADDRESS: _____

BENEFICIARY #4 NAME: _____ PHONE # _____

RELATIONSHIP: _____

PERCENT % TO BE DISTRIBUTED (total must equal 100% among beneficiaries) _____

ADDRESS: _____

BENEFICIARY #5 NAME: _____ PHONE # _____

RELATIONSHIP: _____

PERCENT % TO BE DISTRIBUTED (total must equal 100% among beneficiaries) _____

ADDRESS: _____

STEP 3: SUCCESSOR TRUSTEES/EXECUTORS

Who would you like to serve as the **TRUSTEE OF YOUR TRUST** and **EXECUTOR** of your Will?
(A **TRUSTEE** is the individual or professional appointed to oversee the administration of your **TRUST** after you can no longer do so. AN **EXECUTOR** is the individual appointed to oversee the administration of your estate pursuant to the **WILL**)

AGENT #1 NAME: _____

RELATIONSHIP: _____

ADDRESS & PHONE: _____

AGENT #2 NAME: _____

RELATIONSHIP: _____

ADDRESS & PHONE: _____

AGENT #3 NAME: _____

RELATIONSHIP: _____

ADDRESS & PHONE: _____

STEP 4: GUARDIANSHIP

Who would you like to serve as **GUARDIAN OF MINOR CHILDREN?**
(The *GUARDIAN* is the individual appointed to care for minor children, usually a family member or close friend)

GUARDIAN #1 NAME: _____

GUARDIAN #2 NAME: _____

GUARDIAN #3 NAME: _____

STEP 5: FINANCIAL POWER OF ATTORNEY

(The *FINANCIAL POWER OF ATTORNEY* is the person designated to handle your financial affairs)

FOR HUSBAND OR CLIENT 1:

AGENT #1 NAME: _____

AGENT #2 NAME: _____

AGENT #3 NAME: _____

FOR WIFE OR CLIENT 2:

AGENT #1 NAME: _____

AGENT #2 NAME: _____

AGENT #3 NAME: _____

STEP 6: HEALTHCARE POWER OF ATTORNEY

Who would you like to serve as your **POWER OF ATTORNEY FOR HEALTH CARE DECISIONS** as well as **CONSERVATOR OF YOUR PERSON?**

*(The **POWER OF ATTORNEY FOR HEALTHCARE** is the person designated to carry out your end-of-life decisions. A **CONSERVATOR** is the individual appointed to oversee your care if you are incapacitated or unable to manage your affairs)*

FOR HUSBAND OR CLIENT 1:

AGENT #1 NAME: _____

ADDRESS & PHONE: _____

AGENT #2 NAME: _____

ADDRESS & PHONE: _____

AGENT #3 NAME: _____

ADDRESS & PHONE: _____

FOR WIFE OR CLIENT 2:

AGENT #1 NAME: _____

ADDRESS & PHONE: _____

AGENT #2 NAME: _____

ADDRESS & PHONE: _____

AGENT #3 NAME: _____

ADDRESS & PHONE: _____

STEP 7: DISTRIBUTIONS

DISTRIBUTION TO UNDER-AGED BENEFICIARIES *(at what age would you like your beneficiaries to be in control of their sole and separate trust?)*

Hold in Trust until Age _____ *(enter age)*

OR

Staged Distribution:

@ Age 25 or _____, 25% or _____, and

@ Age 30 or _____, 50% or _____, and

@ Age 35 or _____, Remainder of Trust Share or _____.

ADDITIONAL DISTRIBUTIONS:

Early withdraw of share for BUSINESS or PROFESSION: \$10,000 or \$ _____.

Early withdraw of share for PRIMARY HOME PURCHASE: \$20,000 or
\$ _____.

Early withdraw of share for EDUCATION

OTHER COMMENTS OR ACTION DESIRED:

ASSET LIST – BASIC

A. Real Property (Physical Address – may attach copy of deeds):

B. Personal Property (to be specifically distributed, i.e. grandmas' ring to my daughter):

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