

Law Offices of Gary A. Quackenbush

ESTATE PLANNING BASIC INFORMATION WORKSHEET

IN ORDER THAT WE MAY BETTER SERVE YOU, PLEASE PROVIDE
THE FOLLOWING INFORMATION AS COMPLETELY AS POSSIBLE

HUSBAND'S FULL NAME: _____

WIFE'S FULL NAME: _____

CHILDREN OF THIS MARRIAGE:

NAME	M (OR) F	BIRTHDATE	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

HUSBAND'S PRIOR SPOUSE'S FULL NAME: _____

HOW WAS PRIOR MARRIAGE TERMINATED:

DEATH: _____ DATE: _____ PLACE: _____

DIVORCE: _____ DATE: _____ COURT: _____

CHILDREN OF HUSBAND'S PRIOR MARRIAGE:

NAME	M (OR) F	BIRTHDATE	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

WIFE'S PRIOR SPOUSE'S FULL NAME: _____

HOW WAS PRIOR MARRIAGE TERMINATED:

DEATH: _____ DATE: _____ PLACE: _____

DIVORCE: _____ DATE: _____ COURT: _____

CHILDREN OF WIFE'S PRIOR MARRIAGE:

NAME	M (OR) F	BIRTHDATE	DEATH
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

WHO WOULD YOU LIKE TO SERVE AS TRUSTEE OF YOUR TRUST?

(A **TRUSTEE** is the individual or professional appointed to oversee the administration of your **TRUST** after you can no longer do so)

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

WHO WOULD YOU LIKE TO SERVE AS EXECUTOR OF YOUR ESTATE?

(AN **EXECUTOR** is the individual appointed to oversee the administration of your estate pursuant to the **WILL**)

FOR HUSBAND:

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

FOR WIFE:

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

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)

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

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:

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

FOR WIFE:

NAME: _____
(FIRST CHOICE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

NAME: _____
(ALTERNATE)

RELATIONSHIP: _____ ADDRESS & PHONE: _____

PROPERTY DISPOSITION (Call GQ Law right away if you have questions on this!)

- 1. **PRIMARY DISTRIBUTION**
 - ALL TO SPOUSE
 - OTHER (SPECIFY BELOW):

<u>ITEM</u>	<u>TO</u>	<u>RELATIONSHIP & ADDRESS</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

- 2. **SECONDARY DISTRIBUTION**
(IF PRIMARY DISTRIBUTION NOT POSSIBLE DUE TO DEATH OF SPOUSE OR OTHER BENEFICIARIES)
 - ALL TO CHILDREN AND THEIR CHILDREN
 - ALL TO CHILDREN ONLY

- 3. **DISTRIBUTION TO UNDER-AGED BENEFICIARIES:**
 - Hold in Trust until Age 18 or _____.
 - Staged Distribution:
 1. @ Age 25 or _____, 25% or _____, and
 2. @ Age 30 or _____, 50% or _____, and
 3. @ Age 35 or _____, Remainder of Trust Share or _____.

- 4. **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

- 5. **OTHER DISTRIBUTIONS (BELOW):**

<u>ITEM</u>	<u>TO</u>	<u>RELATIONSHIP & ADDRESS</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

OTHER COMMENTS OR ACTION DESIRED:
