

ADDITIONAL INFORMATION NEEDED FOR ESTATE PLANNING

Type of Estate Plan:

____ Revocable Trust with Pour-Over Will ____ Simple Will ____ Testamentary Trust

For the Pour-Over Will or Simple Will:

Personal Representative: ____ SPOUSE or ____ OTHER (and state relationship): _____

Successor Personal Representative and relationship - 1st: _____

Successor Personal Representative and relationship - 2nd: _____

Guardian for Minor Child(ren): _____

Successor Guardian: _____

For Revocable Trust(s):

Initial Trustee(s): ____ Settlor(s) or ____ OTHER (and state relationship): _____

Successor Trustee and relationship: _____

Second Successor Trustee and relationship: _____

Third Successor Trustee and relationship: _____

Distribution for minor child(ren): ____ Separate Trusts ____ Single Trust

Distribution for both Will(s) and Trust(s):

Spouse: _____

Child(ren): _____

Age(s) for Distribution ____ 18 ____ 21 ____ 25 ____ Other _____

____ Half at earlier of bachelor's Degree or 25 and balance at ____ 30 or ____ Other _____

____ Distribution contingent on educational degree: _____

____ Other contingency: _____

____ Lifetime Trust

Distribution to adults/charities:

Name of beneficiary: _____ % or \$ amount: _____

If Beneficiary does not survive? _____ to their descendants, or other _____

Name of beneficiary: _____ % or \$ amount: _____

If Beneficiary does not survive? _____ to their descendants, or other _____

Name of beneficiary: _____ % or \$ amount: _____

If Beneficiary does not survive? _____ to their descendants, or other _____

Name of beneficiary: _____ % or \$ amount: _____

If Beneficiary does not survive? _____ to their descendants, or other _____

Distribution if not survived by child(ren) (or any descendants):

Other Trust(s) IRA: _____

SNT: _____

Age(s) for outright distribution/control _____

Trustee(s): _____

Distribution Upon death of beneficiary: _____ descendants _____ beneficiary decides

For General Durable Power of Attorney (recommend that alternate agents for Husband and Wife be the same and that they mirror the successor Trustee if Revocable Trust is being used; note that many corporate trustees will not serve in this role and have to be consulted prior to being named)

Attorney in Fact/Agent: _____ SPOUSE or _____ OTHER (and relationship): _____

Successor Attorneys in Fact - Husband: 1. _____ 2. _____

Successor Attorneys in Fact - Wife: 1. _____ 2. _____

Other wishes: _____

For Health Care Declaration (can have different alternates)

Attorney in Fact/Agent: _____ SPOUSE or _____ OTHER (and relationship): _____

Successor Attorneys in Fact - Husband: 1. _____ 2. _____

Relationship: _____

City & State: _____

Phone: _____

Successor Attorneys in Fact - Wife: 1. _____ 2. _____

Relationship: _____

City & State: _____

Phone: _____

Special/Other wishes - Husband: _____

Special/Other wishes - Wife: _____