



Estate Planning Agent Information

The information on this form will be used by Walters & Galloway, PLLC to prepare your legal documents.

Important: Please write legal names and additional information exactly as it should appear on each document.

Client(s) Names(s)

Address

Last Will and Testament

Primary Personal Representative

Name

Address

First Successor Personal Representative

Name

Address

Second Successor Personal Representative

Name

Address

Beneficiaries Information

(please list relationship to client)

Specific Bequests

(please list the item and the beneficiary of the item for any specific tangible personal property you wish to devise)

Trust

Initial Trustee

Name

Address

Phone: (H)

(C)

(W)

DOB

Successor Trustee

Name

Address

Phone (H)

(C)

(W)

DOB

Lifetime Distribution Trustee

Name

Address

Phone (H)

(C)

(W)

Have Any Beneficiaries Filed for Any of the Following

Divorce Yes No

Bankruptcy Yes No

Do the Beneficiaries Have Any Special Needs?

Yes No

General Durable Power of Attorney

Primary Agent

Name

Relationship

Address

First Alternate Agent

Name

Relationship

Address

Second Alternate Agent (Optional, but recommended)

Name

Relationship

Address

Special Provisions

Healthcare Power of Attorney

Primary Agent

Name

Relationship

Address

Phone (H)

(C)

Email

First Alternate Agent

Name

Relationship

Address

Phone (H)

(C)

Email

Second Alternate Agent (Optional, but recommended)

Name

Relationship

Address

Phone (H)

(C)

Email

Special Instructions