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Please list any special provisions for pets.

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Please list any funeral arrangement specifics that have already been made, or any such special requests.

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Please list any specific estate planning objectives, concerns, or requests that you would like to discuss and/or address in your Will.

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**IV. ASSET AND INSURANCE INFORMATION**

Please list all real estate owned including how title is held (i.e. tenants by the entirety, tenants in common or own with siblings, wife, etc.)

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Please list all life and/or long term care insurance policies, including term, amount and beneficiary information

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Please list all Pensions, IRAs, Annuities and/or Work Connected Benefits

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Please indicate if you are interested in obtaining information regarding either Life or Long-Term Care insurance. Yes / No

**Life Insurance** Insurance that guarantees a specific sum of money to your designated beneficiary upon your death or to yourself if you live beyond a certain age.

**Long- Term Care Insurance** Insurance that can provide benefits to help pay for care you may need in the future.

## **TERMS and DEFINITIONS**

**TESTAMENTARY TRUST:** A Testamentary Trust is a trust that does not take effect until your death. Often used for minor children, this type of trust can be set up to “pay out” at any time, or in stages depending on your child’s age.

**EXECUTOR:** A person named in your will who will ultimately manage your estate. Your executor will ensure that inheritance taxes are paid on your estate, and do their best to carry out your wishes.

**TRUSTEE for MINOR CHILDREN:** A Trustee will make certain that any money held in trust for your minor children is kept for that purpose, as well as distributed to your children in accordance with your wishes. A Trustee can be one or two persons you trust, or you may choose to use a bank or your financial adviser.

**GUARDIAN for MINOR CHILDREN:** The Guardian(s) you choose to be the person (or persons) who provides protective supervision over your children is obviously one of the most important decisions you will have to make. A Guardian will not only be responsible for your children, but will also be able to pull money from the Trust you set up (with the permission of the Trustee) in order to pay for education, the cost of living, and other expenses for your children.

**POWER of ATTORNEY:** A legal document that allows you (the “principal”) an opportunity to authorize an “agent” (usually a trusted family member, friend, or Attorney) to make legal decisions for you when you are no longer able to do so for yourself.

**LIVING WILL:** A legal document that voices your medical decisions if you are unable to speak for yourself as a result of medical incapacity.

**LONG-TERM CARE INSURANCE:** Insurance that can provide thousands of dollars in benefits to help pay for care you may need in the future.

**LIFE INSURANCE:** Insurance that guarantees a specific sum of money to your designated beneficiary upon your death or to yourself if you live beyond a certain age.