

INFORMATION NEEDED FOR ROUGH DRAFT OF ESTATE PLAN

TRUST INFORMATION

FULL LEGAL NAME: _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

PHONE _____ EMAIL _____

SPOUSE LEGAL NAME (if married): _____

CHILDREN NAMES (if applicable-write separate address if applicable):

SUCCESSOR TRUSTEE NAME: _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

(The successor trustee is the person(s) who will control the money in your trust when you are not available. (Example: Spouse, Parents, Sibling, Friend) If you're married this is the person you want to control your money after you and your spouse cannot).

ALTERNATE SUCCESSOR TRUSTEE

LEGAL NAME: _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

(The alternate successor trustee is the person(s) who will control the money in your trust when your first choice (the successor trustee) is unable or unwilling to serve.)

AGE WHEN BENEFICIARIES INHERIT: _____

(After you're deceased-- the children must be this age before they get control of the money. Decide what age is appropriate for your children to be mature enough to make financial decisions. Older ages help prevent spendthrift issues.)

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CONTINGENT BENEFICIARIES:

LEGAL NAME: _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

(This is the final beneficiary – such as a charity or church - if no other beneficiary is able to inherit before the money goes to the state)

FINANCIAL POWER OF ATTORNEY (other than spouse if applicable)

LEGAL NAME _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

TYPE OF MEMORIAL: BURIAL CREMATION

HEALTHCARE INFORMATION

LIVING WILL AGENT & HEALTHCARE POWER OF ATTORNEY (other than spouse)

LEGAL NAME _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

CHILDREN (if applicable)

ARE CHILDREN MINORS? YES NO

RESPONSIBLE PARTY FOR CARE OF MINOR CHILDREN

LEGAL NAME _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

ALTERNATIVE PARTY FOR CARE OF CHILDREN

LEGAL NAME _____

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

Funding Directions:

Residence

Rental Properties

Business Entities