

ESTATE PLANNING INTAKE FORM

- 1. PERSONAL INFORMATION:** The person preparing the Will needs to know some personal information about you, including your marital status and whether you have children.

Will Writer: _____

Address: _____

Phone: _____

Birthdate: _____

Employer: _____

Phone: _____

Marital Status: _____

Spouse: _____

Birthdate: _____

Employer: _____

Phone: _____

Prior Marriages:

Children: Do you have children? If so, please fill out the information below

Child 1

Name: _____

Address: _____

Phone: _____

Birthdate: _____

Child 2

Name: _____

Address: _____

Phone: _____

Birthdate: _____

Child 3

Name: _____

Address: _____

Phone: _____

Birthdate: _____

2. THE VALUE OF YOUR ESTATE: The value of estate assets is needed to determine whether “estate taxes” may be an important consideration in the preparation of a will (or living trust). Although federal estate taxes are not usually a factor in estates of less than

\$5,120,000 as of 2012, it may become important to consider more complex estate planning techniques in estates of \$4,000,000 which could grow to those levels. The manner in which assets are held (e.g. “jointly” or “in one name only”) is also important in determining who will receive certain property (i.e., generally “joint” property goes to the “surviving” joint tenant regardless of what the will may provide).

PROPERTY: Do you own property? If yes, fill out below. If no, skip to the next section.

REAL ESTATE

1. Property Address: _____

County: _____

Name(s) on the Deed for the property: _____

Acreage: _____

2. Property Address: _____

County: _____

Name(s) on the Deed for the property: _____

Acreage: _____

3. Property Address: _____

County: _____

Name(s) on the Deed for the property: _____

Acreage: _____

OIL AND GAS RIGHTS

4. Property Address: _____

County: _____

Name(s) on the Deed for the property: _____

Acreage: _____

Percentage Owned: _____

5. Property Address: _____

County: _____

Name(s) on the Deed for the property: _____

Acreage: _____

Percentage Owned: _____

INVESTMENTS:

1. Retirement Funds/Annuities

a. Name of Company holding/managing the Retirement Fund: _____

- i. Address: _____
 - ii. Phone Number: _____
 - iii. Value Amount (this will fluctuate, use an estimated value): _____
- b. Name of Company holding/managing the Retirement Fund:
- i. Address: _____
 - ii. Phone Number: _____
 - iii. Value Amount (this will fluctuate, use an estimated value): _____

3. DISTRIBUTION OF THE ESTATE ASSETS: The persons or organizations (beneficiaries) who will receive the assets of the estate must be identified. Who would you like your property and assets to go to?

Name 1: _____

Name 2: _____

Name 3: _____

Name 4: _____

Name 5: _____

Name 6: _____

Name 7: _____

Name 8: _____

Name 9: _____

Name 10: _____

4. EXECUTOR/PERSONAL REPRESENTATIVE: An executor is the person or organization named in a Will who has the responsibility to carry out the terms of the Will (i.e. collect the assets, pay the debts, and distribute the remaining assets to the beneficiaries).

***This person will take care of opening the estate, filing the will, and overseeing distribution of assets by the terms of the will. THIS NEEDS TO BE A TRUSTWORTHY AND HONEST PERSON(S).**

***It is always a good idea to set this up with 3 names. In case, something may happen to an executor, someone else can step in based on the terms of your will.**

Executor Choice #1: _____

Executor Choice #2: _____

Executor Choice #3: _____

5. TRUSTEE: A trustee is the person or organization named in a Will who has the responsibility to manage the trust assets and to make distributions as required by the terms of the trust. **YOU CAN APPOINT MORE THAN ONE TRUSTEE**

Trustee Choice #1: _____

Trustee Choice #2: _____

Trustee Choice #3: _____

Trustee Choice #4:

6. ADDITIONAL INFORMATION: Please include any additional information you feel would be important.
