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ESTATE PLANNING WORKSHEET

1. _____
Your Name SSN Telephone _____

Date of Birth

2. _____
If Married, Name of Spouse SSN _____

Spouse's Date of Birth

3. _____
Mailing Address

4. _____
City or County of Residence

5. Names and ages of all children. Please list all children, whether now living or deceased, and indicate whether any are adopted or are children from a prior marriage, etc.

Name Date of Birth _____

Name Date of Birth (continue below, as needed)

6. Please indicate approximate size of the estate (including life insurance, real estate, retirement plans, and all other assets).

7. Do you have living wills or powers of attorney? _____

8. If you wish to consider having us prepare for you a living will and/or power of attorney to cover

your temporary or permanent disability, provide the full name, address and residence phone number of an agent and an alternate agent to make these decisions on your behalf:

Living Will:

General Power of Attorney

Last Will & Testament

Agent: _____

Agent: _____

Agent: _____

Sub Agent: _____

Sub Agent: _____

Sub Agent: _____

9. If you wish to have us prepare a Will, provide:

a. Names and address of Executor and Alternate Executor

b. If minor children are declared, provide full names and addresses of legal guardian and alternate legal guardian

c. Names and addresses of each beneficiary and what percentage of your assets you may wish each to receive

d. Names and addresses and specific description of property for any special bequests you wish to make

e. If you wish to specifically disinherit an ex-spouse, or anyone else, provide full names of such persons

