ESTATE PLANNING
WORKBOOK

PACIFIC
LEGACY LAW

Plan Type

☐ **Single** ☐ **Married**

Principal Information

The primary individual or individuals who are creating this Estate Plan are considered the Principals.

Legal Name:

Date of Birth: **SS Number:**

Address:

Legal Name:

Date of Birth: **SS Number:**

Address:

Family Information

The status of a child is either a. Of Marriage, b. Adopted, c. Of Mother or d. Of Father.

Marriage Date: **Marriage Location:**

Childs Legal Name:

Status: **Date of Birth:**

Childs Legal Name:

Status: **Date of Birth:**

Childs Legal Name:

Status: **Date of Birth:**

Childs Legal Name:

Status: **Date of Birth:**

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Minors, Disability or Special Needs

For Minor children or dependents with disabilities or special needs, please nominate a guardian or conservator.

Primary:

Date of Birth: **Relationship:**

Address:

Second:

Date of Birth: **Relationship:**

Address:

Successor Trustee(s)

Your Successor Trustee(s) will manage your Estate only after both principals have died. Consider competency, age and maturity

Primary:

Date of Birth: **Relationship:**

Address:

Second:

Date of Birth: **Relationship:**

Address:

Beneficiary(s)

Beneficiary(s) are those you want inherit a percentage or your estate remainder

☐ **All Children Equally** ☐ **To Children, but Different Percentages** ☐ **To Other Than Children**

Beneficiary:

Date of Birth: **Percentage:**

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Beneficiary(s) Continued

Beneficiary:

Date of Birth: **Percentage:**

Beneficiary:

Date of Birth: **Percentage:**

Limitations & Conditions

Specific Gifts

Financial Power of Attorney Agent

Primary:

Date of Birth: **Relationship:**

Second:

Date of Birth: **Relationship:**

Health Care Power of Attorney Agent

Primary:

Date of Birth: **Relationship:**

Second:

Date of Birth: **Relationship:**

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Assets

There are 3 types of Assets, Personal Property, Real Property and Investments. Identifying assets is a very important aspect of funding the Trust. Our firm is responsibile for fudning Personal into the trust and preparing the Real Property for funding.

Personal Property

Personal Property are physical assets that don't have title such as jewelry, furniture, family heirlooms, cars, guns, etc. These assets will all be included in the Trust.

Real Property

Real Property is residential and or commercial real estate held by the principals. We require the Grant Deed complete with Property Description for each real property asset you want to move into the Trust. We prepare the first Deed as part of the Estate Planning Package, each additional Deed will be charged separately. Deeds can be recovered from the county recorder or we can pull it for a fee.

Investments

Investments like life insurance, 401k, stocks & bonds can only be funded the advisor or the company that manages the investment (Merrill Lynch). We will list your investments as trust assets, but you are responsible for reaching out to your advisor to fund your trust with investment assets. This includes bank accounts.

Appointment Attendance

If you haven't finished this Workbook, please attend your complementary consultation anyway! We can complete it together. We are here to guide you though this process and try to make It as painless as possible .

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Thank you for trusting our firm with your Legacy. Even if you haven't completed this Workbook by our initial consultation, don’t worry, we will complete it together.

Once you have decide to engage our services, we need you to do a little homework. We will need the following documents:

- Grant Deed(s) to any real property assets. If you don’t have these Deeds, you can go to your county recorder and pull them. If you would perfer us to pull them, we charge $75.00 per deed. This is to cover our costs.

- A list of personal property that is either greater than $5,000 or of great sentimental value.

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