

ESTATE PLANNING WORKSHEET

The wealth you'll leave behind includes much more than money and property. We're here to help you create a plan that encompasses your personal thoughts, values, and advice that will assist your trustees and beneficiaries as they implement the plan you've prepared for them.

FILL OUT THIS BRIEF QUESTIONNAIRE TO HELP US CRAFT YOUR TAILORED ESTATE PLANNING DOCUMENTS

ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL

CLIENT DETAILS

Name: _____ SSN: _____
Date of Birth: _____
Single ___ Married ___ Date of Marriage: _____ Divorced ___ Widowed ___
Address: _____
Phone: _____ Email: _____

Spouse's Name: _____ SSN: _____
Date of Birth: _____
Phone: _____ Email: _____
U.S. Citizen(s): Yes ___ No ___ Explain: _____

Children's Names	Dates of Birth	Whose Children
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___

Trustee Information

Trustees are the individuals who will be in charge of managing your trust. They will have the power to manage, invest, and control your assets in the event of your incapacity or death.

Successor Trustees Upon Incapacity or Death

If married, spouse will automatically serve as sole Trustee upon the first incapacity/death. Multiple Trustees can serve together. For Co-Trustees, please include all names on a single line. Co-Trustee Decision-Making Selection: Independent Authority, Majority, or Unanimous.

Name	Co-Trustee Decision-Making Selection
1. _____	
2. _____	
3. _____	

Guardianship for Minor Children

Who would you like to care for your children if necessary? Anyone you do not want?

Name Relationship

1. _____
2. _____
3. _____

Beneficiary Distributions

Funds can be left to beneficiaries Outright (one lump-sum distribution) at a given age (the default age if none is listed will be 25).

Funds can be left to beneficiaries In Trust. This means that funds will be dispersed at given ages or in segments of years following death (Examples: at age 25, age 30, age 35 or at 5 years, 10 years, 15 years following death) (can protect beneficiaries from creditors, bankruptcy, divorce).

Name	Share %	Outright/In Trust	Ages/Years

Concerns About Beneficiaries or Trustees

- Special Needs ____
- Potential Divorce ____
- Potential Drug Abuse ____
- Potential Financial Mismanagement ____
- Potential Bankruptcy ____
- Potential Legal Liabilities (Professional subject to malpractice) ____
- Potential Need of Government Assistance (financial aid, Medi-Cal, disability, food stamps) ____

Power of Attorney (POA)

The person you want to act as your agent over your financial affairs in the event you are not able to make your own financial decisions or are incapacitated (expires upon death).

This is an individual document (each spouse can list different individuals as POA).

If married, it is recommended to select your spouse first unless they are incapacitated.

Multiple POAs can serve together. For Co-POAs, please include all names on a single line.

Co-POA Decision-Making Selection: Independent Authority, Majority, or Unanimous.

- | Name | Co-POA Decision-Making Selection |
|----------|----------------------------------|
| 1. _____ | |
| 2. _____ | |
| 3. _____ | |

