## ESTATE PLANNING WORKSHEET

SINGLE INDIVIDUALS

The information requested on this worksheet is held in complete confidence, and is used for the sole purpose of analyzing estate planning needs and designing estate planning documents. This information enables us to plan the estate to accomplish future goals and to save on taxes and administrative expenses.

This worksheet is intended for single clients. If you are married, or if a domestic partner will be included in your estate plan, please request the appropriate estate planning worksheet from us.

Estate planning is very important for singles as well as couples. Plan of distribution for singles is not obvious and most or all assets will be probated since joint tenancy with a spouse or partner is not an appropriate method of avoiding probate.

Date				
First Name	MI	Last Name		
AKA	Date of Birth	<b>3</b>		
Address				
City	State	Zip	County	
Phone Number	Other Phone	Email		
Marital Status: □ Never m	arried □ Divorced □ W	idowed □ Married		
If married, name of Spouse:				
What is your primary moti	vation for considering es	tate planning? (Select	one or more)	
☐ Probate avoidance ☐ Guardianship for minor ☐ Federal estate tax plann ☐ Othor				

How soon would you like to complete planning? Is there a specific trip, surgery, etc.?	c deadline, such as an upcoming
Do you presently have a will?	☐ Yes ☐ No
Do you presently have a trust (either revocable or irrevocable)?	☐ Yes ☐ No
Are you interested in avoiding probate of your estate?	☐ Yes ☐ No
Were there any previous marriages?  If yes, year marriage ended in:	☐ Yes ☐ No
Do you have any relatives (other than children) who depend on you for all or part of their support?	☐ Yes ☐ No
Do any of your children or other beneficiaries have disabilities?	☐ Yes ☐ No
Do you wish to disinherit any of your children, grandchildren or any other close relative?	☐ Yes ☐ No
Do you want assets passing to your beneficiaries to be held in trust until a specific age or ages?	☐ Yes ☐ No
Do you expect to inherit substantial assets (\$100,000 +)?	☐ Yes ☐ No
Do you own a farm or business?	☐ Yes ☐ No
If yes, do any of your children work in the business with you?	☐ Yes ☐ No
If yes, does the child working in the business have an ownership interest in the business?	☐ Yes ☐ No
Have you ever filed a Federal Gift Tax Return?	☐ Yes ☐ No
Do you have an existing General Power of Attorney?	☐ Yes ☐ No
Do you currently hold any assets in Joint Tenancy with another person?	☐ Yes ☐ No
Do you wish to make anatomical bequests (organ donor)?	☐ Yes ☐ No
Are you a U.S. citizen?	☐ Yes ☐ No
Do you or any family member or potential beneficiaries have any serious health problems?	☐ Yes ☐ No
If yes, please describe briefly:	

<b>Net Worth:</b> If you added t bank accounts, stocks, bo insurance, what is the approximation of the stocks and the stocks are the stocks.	nds, IRAs, a	and anything	else you ow	n except death	benefits on life
What is the value of death b	penefits on lif	e insurance in	suring you?		<del></del>
What is the total amount of	your outstan	ding liabilities	?		
	Childre	n or Other l	Beneficiari	es	
Name		Address		Date of Birth	Relationship
Number of grandchildren: _		Range of	Ages:		
Do you have any deceased  If yes, name		☐Yes	□No	_	
•				_	
If yes, survived by i				_	
If yes, name	(s):			_	
Do you have any adopted c  If yes, name		☐ Yes	□ No	_	

## **Appointments**

1.	<b>Personal Representative.</b> The will should name a personal representative to probate the estate. (Personal representative is also sometimes referred to as executor or administrator.)			
	Personal Representative:			
	Alternate:			
	Second Alternate:			
2.	<b>Successor Trustee.</b> If you choose to avoid probate of your estate by executing a living trust during your lifetime, a successor trustee should be named. The successor trustee would be responsible for managing assets if you were unable to do so. The successor trustee would manage assets in the event of your incapacity and would distribute assets to beneficiaries after death.			
	Successor Trustee:			
	Alternate:			
	Second Alternate:			
3.	<b>Health Care Agent.</b> Who should be named to make medical decisions on your behalf including decisions regarding medical consents, life support issues, and nursing home admission if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent.			
	Health Care Agent:			
	Alternate:			
	Second Alternate:			
4.	<b>Durable Power of Attorney.</b> Who should be named to make financial decisions on your behalf including decisions regarding banking, check writing, and transfers of assets if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee/personal representative or your health care agent as your agent under the power of attorney.			
	Agent:			
	Alternate:			
	Second Alternate:			

## **Plan of Distribution**

1.	<b>Specific Gifts.</b> Do you want to make charitable gifts, such as to a house of worship or other institution? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?				
2.	Briefly describe where you would want assets remaining after any specific gifts are distributed. (Don't worry about tax planning or other considerations in answering this question. We'll consider those details later if needed.)				
	<ul> <li>Equally between children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.</li> <li>Equally between surviving children</li> <li>As follows:</li> </ul>				
3.	Ultimate Distribution. You might want to provide for the distribution of your property if neither you, nor your children/other beneficiaries named above survive.				
	ease complete this section only if you have minor beneficiaries or beneficiaries with				
1.	<b>Guardian.</b> If you have minor children or a beneficiary with special needs, you may need to appoint a guardian. The guardian is responsible for the day-to-day care of the child. It is a good idea to name an alternate guardian to act if your first choice cannot serve.				
	Guardian:				
	Alternate:				

2. **Testamentary Trustee.** You may need a trustee to manage assets for beneficiaries until they reach an age when you believe they should be capable of managing assets on their own. A trustee can keep the beneficiary's money invested wisely and use it for their education, support,

	etc., until they reach the age specified for outright distribution of assets to them. The testamentary trustee can be the same person named as the guardian, or could be a different person or institution.
	Testamentary Trustee:
	Alternate:
3.	<b>Age of Distribution.</b> If you do establish a trust to allow a third party to manage assets for beneficiaries, then it is necessary for you to decide when the beneficiaries will be mature enough to manage assets on their own. You may want to give each beneficiary his or her share at the time the beneficiary reaches a particular age. You may consider splitting the distribution, such as ½ at age 25 and the balance at age 30, or 1/3 at 21, 1/3 at 25, and 1/3 at 35. You may use any age or combination of ages that you choose.
	General Questions
	otes and Questions: Please note anything else which may be of importance in planning your ate, or note any questions you may have.

Income/Asset/Liability Information

Please list your income/asset/liability information in the appropriate category below.

Attach a separate page if necessary.

Income: Earned Monthly Income from Labor	
Monthly Social Security Income	
Monthly Pension Income	
Other Monthly Income	

Type of Asset	Title in Which Held (You solely, Joint with third party, Tenants in common, etc.)	Current Value
Real Estate (Include type of property e	e.g., residential, agricultural, comm	ercial, or manufacturing.)
Personal Residence		
Vacant Land		
Other:		
Liquid Assets		
Cash on Hand		
Government and Publicly Traded Securities		
Unlisted Securities (Not Publicly Traded)		
Money Market Accounts		
Equity in Business Sole Prop. Partnership		
Notes and Loans Receivable		

Type of Asset	(You solely, J	Thich Held oint with third n common, etc.)	Current Value	
Checking Accounts				
Savings Account				
Certificates of Deposit				
Automobiles				
Other Personal Property				
Annuities	Owner	Beneficiary	Current Value	
IRAs				
Pension/Profit Sharing				
Life Insurance			Cash Value	Death Benefit
Other Assets				
Liabilities	Name Loan Taken In		Amount Owed	