

FEIN COUNSEL

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Estate Planning Worksheet

Client Background Information

Name: _____ Age: _____ D.O.B.: _____

Spouses Name: _____ Age: _____ D.O.B.: _____

Occupation: _____ Spouses Occupation: _____

Address: _____

Telephone: _____

Family:

Children: _____ Age: _____ D.O.B.: _____

_____ Age: _____ D.O.B.: _____

_____ Age: _____ D.O.B.: _____

_____ Age: _____ D.O.B.: _____

Please indicate: (1) If children are by a previous marriage, stepchildren or adopted;
and (2) the address of children not living with you.

Parents (if living): _____ Age: _____ D.O.B.: _____

Brothers/Sisters: _____ Age: _____ D.O.B.: _____

_____ Age: _____ D.O.B.: _____

Fiduciaries:

1. Personal Representatives: Please list, in order of preference, who you would like to serve as Personal Representative of your estate. The Personal Representative is the person who handles your financial affairs and administers your estate after your death

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date of Birth</u>

2. Guardian: If you have any children under the age of 18, please list, in order of preference, who you would like to serve as Guardian of any minor children. The guardian is the person who will raise and care for your children until they reach the age of 18.

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date of Birth</u>

3. Trustee. Please list, in order of preference, who you would like to serve as Trustee of any trusts. Normally married couples nominate the other spouse as their first choice. Whomever you choose, the person selected should be reasonably skilled at managing financial matters.

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date of Birth</u>

Special Family Considerations

Prior Marriages: _____

Children of Prior Marriages: _____

Handicapped child or beneficiaries with special needs: _____

Family Advisers

	<u>Name</u>	<u>Address</u>	<u>Phone Number</u>
Accountant:	_____	_____	_____
Insurance Agent:	_____	_____	_____
Stock Broker:	_____	_____	_____
Physician:	_____	_____	_____
Other:	_____	_____	_____

Property Disposition

1. Special Bequests: This is where you specify specific gifts to specific people

2. General Bequests: Who shall receive the remainder of your estate?

Assets

Item	\$Value/Amount	How held? (Husband, Wife, Jointly)
Cash	\$ _____	_____
Checking Accts	\$ _____	_____

Savings Accts \$ _____

Securities

Stock \$ _____

Bonds \$ _____

Mutual Funds \$ _____

Other \$ _____

Personal Property

Household goods \$ _____

Jewelry \$ _____

Apparel \$ _____

Other \$ _____

Real Estate

Home \$ _____

Recreational \$ _____

Investment \$ _____

Other \$ _____

Business Holdings

Briefly describe business (i.e. corporation, llc, partnership, etc.)

Retirement

IRA, Profit Share, 401k, etc. \$ _____

Insurance and Annuities

Type (term, etc.) _____ \$ _____

Specify primary and alternate beneficiary designation _____

Other assets not listed above

Liabilities

Mortgages	\$ _____	_____
Car Loan	\$ _____	_____
Personal Loans	\$ _____	_____
Business Loans	\$ _____	_____
Other	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

Funeral Arrangements/Cremation

1. Describe preferences

Questions: Use this space to list any questions that you want me to address