

ESTATE PLANNING WORKSHEET

FULL NAME \_\_\_\_\_

ALL OTHER NAMES BY WHICH I HAVE BEEN KNOWN \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

TELEPHONE DAY \_\_\_\_\_

TELEPHONE EVE \_\_\_\_\_

MARRIAGES: COMPLETE INFORMATION FOR EACH MARRIAGE. ATTACH ADDITIONAL SHEET(S) IF NECESSARY

1<sup>ST</sup> MARRIAGE. . . . .

1<sup>ST</sup> SPOUSE'S NAME \_\_\_\_\_

DATE OF MARRIAGE \_\_\_\_\_

PLACE OF MARRIAGE \_\_\_\_\_

1<sup>ST</sup> MARRIAGE ENDED IN

SPOUSE'S DEATH ON (DATE) \_\_\_\_\_

DIVORCE ON (DATE) \_\_\_\_\_

2<sup>ND</sup> MARRIAGE. . . . .

2<sup>ND</sup> SPOUSE'S NAME \_\_\_\_\_

DATE OF MARRIAGE \_\_\_\_\_

PLACE OF MARRIAGE \_\_\_\_\_

2<sup>ND</sup> MARRIAGE ENDED IN

SPOUSE'S DEATH ON (DATE) \_\_\_\_\_

DIVORCE ON (DATE) \_\_\_\_\_

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CHILDREN: LIST ALL CHILDREN BORN TO OR ADOPTED BY SUBJECT. LIST ALL CHILDREN WHETHER BORN IN WEDLOCK OR OUT OF WEDLOCK. ATTACH ADDITIONAL SHEETS IF NECESSARY

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If you have minor children, you should appoint a guardian to take care of them if both their parents die before they reach age 18 (you can also appoint a married couple as co-guardians). You must also appoint a trustee to manage any money the children inherit. The trustee and the guardian are frequently the same person; if you prefer to appoint different people to these posts, please make a note in the margin. If you wish to appoint more alternates than the spaces below allow, please attach additional sheets.

1<sup>ST</sup> CHILD .....

FULL NAME \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

PLACE OF BIRTH \_\_\_\_\_

NAME OF OTHER PARENT \_\_\_\_\_

ADDRESS, IF LIVING \_\_\_\_\_

IF UNDER AGE 18, GUARDIAN OF PERSON \_\_\_\_\_

GUARDIAN OF ESTATE \_\_\_\_\_

IF NOT LIVING, DATE OF DEATH \_\_\_\_\_

PLACE OF DEATH \_\_\_\_\_

2<sup>ND</sup> CHILD .....

FULL NAME \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

PLACE OF BIRTH \_\_\_\_\_

NAME OF OTHER PARENT \_\_\_\_\_

ADDRESS, IF LIVING \_\_\_\_\_

IF UNDER AGE 18, GUARDIAN OF PERSON \_\_\_\_\_

GUARDIAN OF ESTATE \_\_\_\_\_

IF NOT LIVING, DATE OF DEATH \_\_\_\_\_

PLACE OF DEATH \_\_\_\_\_

3<sup>RD</sup> CHILD . . . . .

FULL NAME \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

PLACE OF BIRTH \_\_\_\_\_

NAME OF OTHER PARENT \_\_\_\_\_

ADDRESS, IF LIVING \_\_\_\_\_

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IF UNDER AGE 18, GUARDIAN OF PERSON \_\_\_\_\_

GUARDIAN OF ESTATE \_\_\_\_\_

IF NOT LIVING, DATE OF DEATH \_\_\_\_\_

PLACE OF DEATH \_\_\_\_\_

4<sup>TH</sup> CHILD . . . . .

FULL NAME \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

PLACE OF BIRTH \_\_\_\_\_

NAME OF OTHER PARENT \_\_\_\_\_

ADDRESS, IF LIVING \_\_\_\_\_

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IF UNDER AGE 18, GUARDIAN OF PERSON \_\_\_\_\_

GUARDIAN OF ESTATE \_\_\_\_\_

IF NOT LIVING, DATE OF DEATH \_\_\_\_\_

PLACE OF DEATH \_\_\_\_\_

I WANT EVERYTHING IN MY ESTATE TO GO TO \_\_\_\_\_

IF THAT PERSON DIES BEFORE ME,  
I WANT EVERYTHING IN MY ESTATE TO GO TO \_\_\_\_\_

I WANT TO MAKE SPECIFIC GIFTS AS DETAILED ON THE FOLLOWING PAGES \_\_\_ YES \_\_\_ NO

**MY EXECUTOR/RIX:**

Your executor is responsible for probating your will and distributing your assets to your beneficiaries. Married persons often appoint their spouses as primary executor. Many banks and other institutions will serve as executor for a fee, but often it is best to appoint one of your heirs who is willing to serve for free.

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

**MY ATTORNEY-IN-FACT (THE PERSON OR PERSONS WHO WILL HANDLE MY BUSINESS AFFAIRS FOR ME NOW OR ANY TIME BEFORE I DIE:**

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

**THE GUARDIAN OF MY PERSON, SHOULD I EVER NEED ONE:**

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

3<sup>RD</sup> CHOICE \_\_\_\_\_

**THE GUARDIAN OF MY ESTATE, SHOULD I EVER NEED ONE:**

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

3<sup>RD</sup> CHOICE \_\_\_\_\_

THE PERSON OR PERSONS WHO WILL MAKE DECISIONS REGARDING MY HEALTH CARE, SHOULD I EVER NEED ONE:

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

3<sup>RD</sup> CHOICE \_\_\_\_\_

THE PERSON OR PERSONS WHO WILL DECIDE IF I SHOULD BE TAKEN OFF LIFE SUPPORT, SHOULD THE DECISION EVER HAVE TO BE MADE:

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

3<sup>RD</sup> CHOICE \_\_\_\_\_

UNDER NO CIRCUMSTANCES SHOULD THIS PERSON(S) SERVE AS THE GUARDIAN OF MY PERSON:

1<sup>ST</sup> \_\_\_\_\_

2<sup>ND</sup> \_\_\_\_\_

3<sup>RD</sup> \_\_\_\_\_

UNDER NO CIRCUMSTANCES SHOULD THIS PERSON(S) SERVE AS THE GUARDIAN OF MY ESTATE:

1<sup>ST</sup> \_\_\_\_\_

2<sup>ND</sup> \_\_\_\_\_

3<sup>RD</sup> \_\_\_\_\_

UNDER NO CIRCUMSTANCES SHOULD THIS PERSON(S) GET ANYTHING FROM MY ESTATE WHEN I DIE:

1<sup>ST</sup> \_\_\_\_\_

2<sup>ND</sup> \_\_\_\_\_

3<sup>RD</sup> \_\_\_\_\_

I WANT A DO NOT RESUSCITATE ORDER  YES  NO

SPECIFIC GIFT(S) OF REAL PROPERTY

1<sup>ST</sup> PARCEL. . . . .

ADDRESS \_\_\_\_\_

CITY/COUNTY/STATE \_\_\_\_\_

LEGAL DESCRIPTION \_\_\_\_\_

HOW ACQUIRED \_\_\_\_\_

DATE ACQUIRED \_\_\_\_\_

OTHER OWNER(S) \_\_\_\_\_

WHO GETS YOUR SHARE IN YOUR WILL?

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

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2<sup>ND</sup> PARCEL. . . . .

ADDRESS \_\_\_\_\_

CITY/COUNTY/STATE \_\_\_\_\_

LEGAL DESCRIPTION \_\_\_\_\_

HOW ACQUIRED \_\_\_\_\_

DATE ACQUIRED \_\_\_\_\_

OTHER OWNER(S) \_\_\_\_\_

WHO GETS YOUR SHARE IN YOUR WILL?

1<sup>ST</sup> CHOICE \_\_\_\_\_

2<sup>ND</sup> CHOICE \_\_\_\_\_

## SPECIFIC BEQUEST(S) OF PERSONAL PROPERTY ITEMS

### WHO GETS WHAT?

ITEM	DESCRIPTION	GOES TO (NAME & ADDRESS)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

## SPECIFIC BEQUEST(S) OF MONEY, ACCOUNTS, STOCKS, AND NEGOTIABLE ITEMS

ITEM	DESCRIPTION	GOES TO (NAME & ADDRESS)
1		
2		
3		
4		
5		
6		
7		
8		

