Estate Planning Pre-Meeting Organizer

This form is provided as an aid to you in preparing to meet with one of our attorneys to discuss the subject of estate planning, which can include wills, trusts, gifts, health care and other powers of attorney and so forth.

It is intended as an aid, not a burden.

What we, as attorneys, are looking for is not the last detail about your holdings of stocks and bonds, but rather people among your circle of friends and family, who may need special attention, unique provisions either due to their situation or your feelings about them.

When we examine your assets, again, we are not seeking a “to the penny” valuation, but rather we are seeking information about the assets which may require special attention, special language in the documents you want us to prepare.

Please use this form as you find comfortable, making notes that will prompt our discussion and allow us to produce documents that really do the job you want them to do.

You, Your Family, Your Beneficiaries

	Name	
	Bus. Phone	
	Business	
	Address	
	Soc. Sec	
	Email	

Home Address & Phone:_____

_____

	Yes	No
Are There Divorce Decrees Affecting Your Estate?		
Have You Lived in a Community Property State? (Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Puerto Rico, Texas, Washington, Wisconsin?)		
Gifts Exceeding the $13,000 Annual Exclusion?		

Names and Addresses of Children, Their Spouses, Their Children, and Others to Consider in your Estate Planning:

Name & Address	Name & Address	Name & Address

Real Estate

Your Home: _____

_____

_____

_____

Vacation Home: _____

_____

_____

_____

Other Property(ies)

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

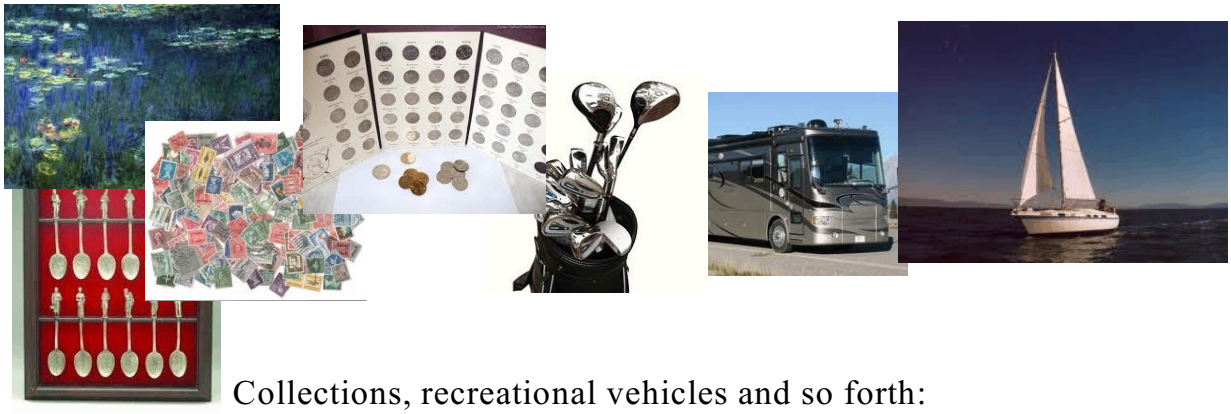
_____

_____

_____

_____

Personal Property



Collections, recreational vehicles and so forth:

_____
_____
_____
_____

Stocks, Bonds,Mutual Funds

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Cash and Bank Accounts

Life Insurance

Your Business or Occupation, Retirement Benefits, Other Owners and Advisors

_____

_____

_____

_____

_____

_____

_____

_____

_____

People Who Might Make Good Guardians for Children, or Good Executors or Trustees of Your Estate. Trusted Advisors

Name	Address	Function