

ESTATE PLANNING

FULL NAMES (Including First, Middle Initial, and Last)

Mr./Mrs./Ms./Miss _____ Mr./Mrs./Ms./Miss _____

Address _____

City, State, Zip _____

Home Phone _____

Cell Phone _____

Cell Phone _____

Email _____

Email _____

How were you referred to our office? (Please check all that apply)

- Newspaper Article Internet Facebook Telephone Book
 Church bulletin Racine Theater Guild Funeral Planning Booklet 4H Placemat
 Personal Referral from _____

Event: Lifestyle Fair Ladies Night Out Other _____

Legal Insurance Plan: Met Life ARAG UAW Legal Resources None

CHILDREN

Names and Ages:

Trustees for Children (who controls the money?):

1st Choice _____

2nd Choice _____

Address _____

Address _____

Guardians for Children (who raises the children?):

1st Choice _____

2nd Choice _____

Address _____

Address _____

Trustee/Personal Representative

For: _____

Spouse, then

For: _____

Spouse, then

1st Choice _____

1st Choice _____

Address _____

Address _____

2nd Choice _____

2nd Choice _____

Address _____

Address _____

General Durable Power of Attorney
(who controls your money and assets if you are unable)

For: _____
 Spouse, then

For: _____
 Spouse, then

1st Choice _____

1st Choice _____

2nd Choice _____

2nd Choice _____

Healthcare Power of Attorney

For: _____
 Spouse, then

For: _____
 Spouse, then

1st Choice _____

1st Choice _____

Address _____

Address _____

Phone # _____

Phone # _____

2nd Choice _____

2nd Choice _____

Address _____

Address _____

Phone # _____

Phone # _____

BENEFICIARY DESIGNATION
(who receives your money and assets?)

Primary Beneficiaries: to Spouse or: _____

Secondary Beneficiaries if primary beneficiaries pre-decease you:

- Inheritance should pass to deceased beneficiary's spouse
- Inheritance should pass to deceased beneficiary's descendants
- Inheritance should return to pool of beneficiaries
- Other – list names: _____

Age of receipt of inheritance for Children/Minor Beneficiaries: _____

If multiple ages of receipt - First Age _____, _____% - Second Age _____, _____%

- Self-directed trust? (to be discussed with attorney)

If all beneficiaries pre-decease you, which persons/organization would receive your estate?

SPECIFIC BEQUESTS

(ie: special items or amounts of cash you want given specifically to people or organizations)

(Attach list if more space required)

REAL ESTATE

- Home Secondary Residence Land Rental Property Business
- Interest in a Land Contract Other/More _____

DESIGNATION FOR TRANSFER ON DEATH DEED(S)

- Joint Tenants (if a beneficiary pre-deceases the other beneficiaries, their portion should return to the pool of beneficiaries)
- Tenants-in-common (if a beneficiary pre-deceases the other beneficiaries, their portion should pass to their descendants)