

PRUITT ZABKOWICZ S.C.

ESTATE PLANNING GUIDE

FULL NAMES

(Including First, Middle Initial, and Last)

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

Cell Phone _____ Cell Phone _____

Email _____ Email _____

Address _____

City, State, Zip _____

Who is Primary contact? _____ phone _____ (cell or home)

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

- ☐ prior client of Attorney _____
☐ Newspaper Article ☐ Internet ☐ Facebook ☐ Telephone Book ☐ Racine Concert Band
☐ Church bulletin ☐ Racine Theater Guild ☐ Funeral Planning Booklet ☐ 4H Placemat
☐ High school scoreboard

☐ Personal Referral from _____

Event: ☐ Lifestyle Fair ☐ Financial planning seminar ☐ Other _____

Legal Insurance Plan: ☐ Met Life ☐ ARAG ☐ Legal Resources ☐ None

CHILDREN (Including First, Middle Initial, and Last)

Names and Ages: _____

Trustees for Children
(who manages the money)

1st Choice _____

2nd Choice _____

Address _____

Address _____

Guardians for Children
(who raises the children)

1st Choice _____

2nd Choice _____

Address _____

Address _____

Trustee – if a trust package
(who controls your trust assets)

Personal Representative – if a will package
(who manages your money and assets after your death)

For: _____

☐ *Spouse, then*

For: _____

☐ *Spouse, then*

1st Choice _____

1st Choice _____

Address _____

Address _____

2nd Choice _____

2nd Choice _____

Address _____

Address _____

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

For: _____
☐ *Spouse, then*

For: _____
☐ *Spouse, then*

1st Choice _____

1st Choice _____

2nd Choice _____

2nd Choice _____

Active immediately ☐ Yes ☐ No-springing

Healthcare Power of Attorney
(who manages your healthcare decisions if you are unable)

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 ☐ to _____

Secondary Beneficiaries if primary beneficiaries predecease you:

- ☐ Inheritance should pass to deceased beneficiary's spouse
- ☐ Inheritance should pass to deceased beneficiary's descendants
(per stirpes or right of representation)
- ☐ 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 predecease 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 predeceases the other beneficiaries, their share should return to the pool of beneficiaries*)
 - ☐ Tenants-in-common (*if a beneficiary predeceases the other beneficiaries, their share should pass to their descendants*)
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