ESTATE PLANNING WORKSHEET
Prepared on _____
for _____

1. PERSONAL INFORMATION:

Employer _____
Address _____
_____
Phone _____
SSN _____
Birthdate _____

Spouse Employer _____
Phone _____

Marital Status: I am married.

Spouse _____
SSN _____
Birthdate _____

Prior Marriages: I have _____ prior marriages.

Children: I have ____ children, but want my Will to cover the possibility that I will have additional children after the signing date of my Will.

2. THE VALUE OF YOUR ESTATE: The value of estate assets is needed to determine whether "estate taxes" may be an important consideration in the preparation of a will (or living trust). Although federal estate taxes are not usually a factor in estates of less than $650,000 (rising to $1,000,000 in 2006), it may become important to consider more complex estate planning techniques in estates of $450,000 which could grow to those levels. The manner in which assets are held (e.g., "jointly" or "in one name only") is also important in determining who will receive certain property (i.e., generally, "joint" property goes to the "surviving" joint tenant regardless of what the will may provide).

The combined estimated "net estate value" for you and your spouse is $_____, based on your estimated value for each asset and liability category.

	You	Your Spouse	Joint with Spouse	Total
Total Assets	$0	$0	$0	$0

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Total Liabilities	$0	$0	$0	$0
Net Estate Value	$0	$0	$0	$0

3. DISTRIBUTION OF THE ESTATE ASSETS: The persons or organizations (beneficiaries) who will receive the assets of the estate must be identified.

Distribution Summary: In general terms, I would like to have the residuary assets of my estate distributed to my spouse if alive, otherwise to my children (in a trust if they are minors).

4. PROVIDING FOR MINOR CHILDREN: I wish to include Will provisions that will create a "trust for minor children". This trust should be activated only if my spouse does not survive my death.

I understand that this type of trust manages all or a portion of my assets for the benefit of my children, until the youngest child attains age ___. When the youngest child reaches the target age, the Trustee begins an outright distribution of the trust assets to the children.

The trust assets should be distributed outright to my children when my youngest living child has reached the age of ___ years.

Trustee: A trustee is the person or organization named in a Will who has the responsibility to manage the trust assets and to make distributions as required by the terms of the trust.

Name _____
City, State _____

5. EXECUTOR: An executor is the person or organization named in a Will who has the responsibility to carry out the terms of the Will (i.e., collect the assets, pay the debts, and distribute the remaining assets to the beneficiaries). In some states, the executor is also known as a "personal representative".

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