

THE SHANKS LAW FIRM

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Partners

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INFORMATION FOR ESTATE PLANNING DOCUMENTS

Family Background Information

Husband's Name: _____ U.S. Citizen: yes no

Date of Birth: _____ Social Security No.: _____

Wife's Name: _____ U.S. Citizen: yes no

Date of Birth: _____ Social Security No.: _____

First Marriage: yes no

Home Address: _____

Home County: _____ Home Phone: _____

Primary Email Address: _____ Work Phone: _____

Children
& Ages: _____

Are all children from this marriage: yes no _____

Will Information

Please list the person(s) and/or institution(s) each of you wish to designate as executors, trustees, or guardians:

Husband's Will:

Wife's Will:

Primary Executor: _____

Primary Executor: _____

Alternates(s): _____

Alternates(s): _____

Primary Trustee: _____

Primary Trustee: _____

Alternates(s): _____

Alternates(s): _____

Primary Guardian: _____

Primary Guardian: _____

Alternates(s): _____

Alternates(s): _____

Estate Plan Statement

In your own words, describe how each of you want your property to pass upon your deaths:(Use an additional sheet if necessary and consider whether the property should pass to a beneficiary's descendants if the beneficiary predeceases you.)

(a) List any property you want to go to specific beneficiaries. Normally we provide in the Will a paragraph that will allow you to leave with your Will a handwritten memo stating where personal property should pass. Thus, you can do that independent of your documents. However, that is not suggested for cash or real estate. Therefore, if there is any specific beneficiary for any cash or real estate, please provide the name and property description:

(b) If you are married and your spouse survives, normally we provide that all property passes first to your spouse, then to your children in equal shares. **Is this the case?** _____

- (c) In addition, most of our clients like the above plan, but wish to take advantage of as many tax savings provisions as possible. **Is this the case?** _____

- (d) However, many of our clients have different wishes as well. If that is the case, how would you like your property to pass?

- (e) If no spouse, children or grandchildren survive you, then how would you want your property to pass?

Financial Information

Please supply the following information or provide a recent financial statement.

Assets:

	<u>Address</u>	<u>Approximate Fair Market Value</u>
(a) Real Estate	(1) _____	_____
	(2) _____	_____
	(3) _____	_____
	Oil & Gas Interests (Total Income for One Year)	_____
(b)	Stocks, Bonds, Notes, Mortgages, Cash (Rough Total excluding 401(k) and IRAs)	_____
(c)	Business Interests (Partnerships, Closely-held Corporation or Sole proprietorships)	_____

(d)	Life Insurance	Company	Face Amount	
	Policy on Husband	_____	_____	_____
	Policy on Husband	_____	_____	_____
	Policy on Wife	_____	_____	_____
	Policy on Wife	_____	_____	_____

(e) Employee Benefits, Retirement Plans and IRAs

	Company	Type	
Husband	_____	_____	_____
Wife	_____	_____	_____

(f)	Annuities	Company	Amount	
	Husband	_____	_____	_____
	Wife	_____	_____	_____

(g) Other substantial assets (i.e. boats, planes, autos, etc.)

_____	_____
_____	_____
_____	_____
_____	_____

Total value of all property listed above: _____

Ancillary Information

Power of Attorney for Financial Affairs: yes no

Spouse only

Other: _____

Directive to Physician (i.e Living Will): yes no

Power of Attorney for Health Care: yes no

If so, three appointees: _____

