

ESTATE PLANNING WORKSHEET

How did you find us?

- Personal Referral Google Search, search terms used _____
 Other internet Search NKyDivorce.com Street Sign
 Other, _____

First Name:		M.I.:		Last Name:	
Address:					
City		State		Zip	
DOB:		SSN:			
E-mail:			Cell:		
Home:			Work:		
Do You Already Have: ___ Will ___ Trust ___ Living Will ___ Power of Attorney					
Spouse:					
First Name:		M.I.:		Last Name:	
Address:					
City		State		Zip	
DOB:		SSN:			
E-mail:			Cell:		
Home:			Work:		
Do You Already Have: ___ Will ___ Trust ___ Living Will ___ Power of Attorney					

I. Beneficiaries

For all property without a documented beneficiary, list the people you would like to receive a part of your estate, including family members, friends, and charities. In this list, only include those persons whom are first in line to receive your estate upon your death. Alternate beneficiaries will be listed in the next box

	Name	% to Receive/Specific Request
First Primary Beneficiary		
Second Primary Beneficiary		

	Name	% to Receive/Specific Request
Alternate Beneficiaries		

Are any of your beneficiaries disabled? _____

For Administrative Use Only:

- Basic
 Pourover
 Testamentary Trust
 Standard

II. Executor

Name the person or persons you would like to appoint to administer your estate. He or she-in which case she is called the "executrix"-will carry out your wishes as stated in your will. Two people may serve together in this role. Also name two alternates in case the first and second appointed cannot serve for any reason. A bank or other financial institution is a good choice for an alternate, but check on their costs first.

Executor/Executrix

1 _____ Relation _____
2 _____ Relation _____

Alternate

1 _____ Relation _____
2 _____ Relation _____

III. Guardian of Children

The most important purpose of a will for most younger people is the appointment of a guardian for their children under age 18. All people with children should have wills for this purpose. The other parent of your child will typically have custody in the event of your death. These Guardians are named in the event the other parent predeceases you.

Guardian _____ Relation _____
Alternate 1 _____ Relation _____
Alternate 2 _____ Relation _____

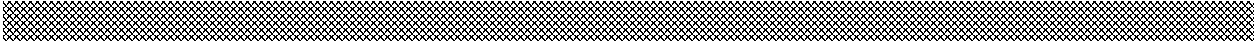
IV. Power of Attorney

Two people may serve together in this role. Please name one or more persons to serve as power of attorney.

POA: _____ Relation: _____
Address: _____ City/St/Zip: _____

1st Alt _____ Relation: _____
Address: _____ City/St/Zip: _____

2nd Alt _____ Relation: _____
Address: _____ City/St/Zip: _____



For Administrative Use Only:

- ___ Durable
- ___ Durable Springing
- ___ Revocation of POA

V. Health Care Surrogates

Two people may serve together in this role. Please name one or more persons to serve as health care surrogate(s).

Surrogate(s): _____ Relation: _____

Alternate: _____ Relation: _____

VI. Your Estate

List the contents of your estate, including bank accounts, stock, IRAs, real estate, motor vehicles, life insurance, and anything else that you may own, whether by yourself or with another person. For this purpose, an estimate of the value is sufficient.

Bank Accounts

<u>Owner's Name</u>	<u>Balance</u>	<u>Joint/ Individual/ or Payable on Death Account?</u>			<u>If P.O.D, name of Beneficiary (ies).</u>
		J	I	P	

Stocks, Bonds, Treasury Notes, Other Investments

<u>Owner's Name</u>	<u>Balance</u>	<u>Joint/ Individual/ or Payable on Death Account?</u>			<u>If P.O.D, name of Beneficiary (ies).</u>
		J	I	P	

Life Insurance, IRAs, Pension, 401K

<u>Owner's Name</u>	<u>Balance</u>	<u>Loans</u>	<u>Name of Beneficiary</u>

Real Estate

<u>Owner's Name</u>	<u>Value</u>	<u>Mortgage</u>	<u>Comments, if any</u>

Business Interests

<u>Name of Business</u>	<u>Value</u>	<u>% of Ownership</u>	<u>Names of other owners/shareholders</u>

