

## ESTATE PLANNING WORKSHEET

Please complete this document in anticipation of our Estate Planning meeting. This document will help me to determine the best methods of meeting your goals.

Name: \_\_\_\_\_

Spouse (if any): \_\_\_\_\_

Residence: \_\_\_\_\_

### I. Information Regarding Heirs

Do you have any children? (Please circle one) Yes No

If so, how many children: \_\_\_\_\_

Do you have grandchildren? (Please circle one) Yes No

If so, how many grandchildren: \_\_\_\_\_

### II. Information Regarding Current Estate Plan

#### A. Last Will and Testament

Do you have a will? (Please circle one) Yes No

If so, when did you sign will? \_\_\_\_\_

If you have executed a will, when was it last updated: \_\_\_\_\_

Who do you prefer to be listed as Executor of your Estate? \_\_\_\_\_

If you have a copy of any existing will in your possession, please bring the document to the meeting.

B. Health Care Proxy

Do you have a Health Care Proxy? Yes No

If so, when did you sign the Health Care Proxy? \_\_\_\_\_

Who do you prefer to have listed as your health care agents to make determinations regarding your medical care? \_\_\_\_\_

C. Living Will

Do you have a Living Will? Yes No

If so, when did you sign the Living Will \_\_\_\_\_

Are you interested in amending your Living Will?

If you have a copy of any existing Living Will, please provide it to my office for review.

D. Durable Power of Attorney

Do you have a Durable Power of Attorney? Yes No

If so, when did you sign the Durable Power of Attorney  
\_\_\_\_\_

Are you interested in amending your Durable Power of Attorney?

Who do you prefer to have listed as your agents to make financial transactions on your behalf in the event that you are unable to do so?

If you have a copy of any existing Durable Power of Attorney, please provide it to my office for review.

E. Trust Documents

Do you have any Trusts (Please circle one ) Yes No

If so, when did you sign the trust document \_\_\_\_\_

Who do you prefer to have listed as trustees to act on behalf of the Trust?

