

PERSONAL AND FINANCIAL ORGANIZER  
FOR YOUR LIVING TRUST OR WILL

NAME(S): (as they will appear in documents)

Birth Date(s):

Social Security No(s):

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_

His Employer: \_\_\_\_\_

Her Employer: \_\_\_\_\_

County: \_\_\_\_\_

US Citizens: Him: Yes / No Her: Yes / No

Home Ph: \_\_\_\_\_

Fax: \_\_\_\_\_

His Work Ph: \_\_\_\_\_

Cellular/Pager: \_\_\_\_\_

Her Work Ph: \_\_\_\_\_

Other Phone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

OK to Call at Work: Him: Yes / No Her: Yes / No

Today's Date: \_\_\_\_\_

CHILDREN (List children in order of birth, indicate if any deceased.)

Birth Date:

Address:

1) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

2) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

3) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

4) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

5) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

6) \_\_\_\_\_ (H / W / Both) \_\_\_\_\_

\_\_\_\_\_

Spouse/No. of Children: \_\_\_\_\_

\_\_\_\_\_

MARITAL INFORMATION: Were you previously married? \_\_\_\_\_ Yes \_\_\_\_\_ No

For each prior marriage of either spouse, indicate on the reverse side of this sheet the name of the prior spouse, the date of marriage, the date of termination, reason for termination (i.e., divorce, death, etc.) and, if divorced, whether prior spouse is living. Please supply copy of any divorce decrees.

HOW DID YOU COME INTO CONTACT WITH US? \_\_\_\_\_

**SELECTING YOUR DECISION MAKERS**  
(SEE ATTACHED SHEET FOR "ESTATE PLANNING ISSUES" TO CONSIDER)

**YOUR SUCCESSOR TRUSTEE(S)**

**RELATIONSHIP AND ADDRESS INFORMATION**

1) _____	_____
2) _____	_____
3) _____	_____

**GUARDIAN(S)** (FOR MINOR/DISABLED CHILDREN)

1) _____	_____
2) _____	_____
3) _____	_____

**TRUSTEE(S) FOR CHILDREN**

1) _____	_____
2) _____	_____
3) _____	_____

**EXECUTOR(S)** FOR WILLS

1) _____	_____
2) _____	_____
3) _____	_____

**POWER OF ATTORNEY FOR PROPERTY:** (FINANCIAL DECISIONS)      EFFECTIVE DATE: \_\_\_\_\_ IMMEDIATE    \_\_\_\_\_ UPON DISABILITY

1) _____	_____
2) _____	_____
3) _____	_____

**POWER OF ATTORNEY FOR HEALTH CARE:** (MEDICAL DECISIONS)

1) _____	_____
2) _____	_____
3) _____	_____

**DO YOU WANT A "LIVING WILL"?**    HIM: \_\_\_\_\_ YES    \_\_\_\_\_ NO      HER: \_\_\_\_\_ YES    \_\_\_\_\_ NO

**ANY SPECIAL INSTRUCTIONS FOR HEALTH DECISIONS?** (ATTACH SEPARATE SHEET IF NECESSARY)

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\_\_\_\_\_

\_\_\_\_\_



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LIST ANY OTHER SPECIAL CONSIDERATIONS (E.G., CARE OF PETS, STIPENDS FOR GUARDIANS, ETC.) AND ANY OTHER QUESTIONS YOU WOULD LIKE TO HAVE ADDRESSED:

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Description of Assets	Approximate Values		
	Joint Tenancy \$	His Name \$	Her Name \$
Business Assets			
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Life Insurance			
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Automobiles & Licensed Vehicles			
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Others (e.g., Anticipated Inheritance, Collectibles, Etc.)			
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total	\$	\$	\$

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## ESTATE PLANNING ISSUES

The following are issues you should consider when selecting others to act in your place or when making decisions regarding the distribution of your estate:

1. Guardian for Minor Children. If you have children under age 18, who would you want to serve as guardian to take care of them and see to their upbringing and education in the event of your death? If you name a married couple, what if they are not married to each other at the time of your death? What about a successor guardian if the first doesn't act? Would you want the same individuals to manage their property and finances, too? If not, who should be named to handle such matters? Will your guardians need financial help above and beyond having your assets available to use for the needs of your children?

2. Personal Representative/Executor. Who would you want to be the personal representative/executor of your Will? This is the person or bank in charge of paying final debts and taxes and distributing your estate as directed in your Will. This will typically be the same person or persons you name as trustee after your death.

3. Trusts and Trustees. Trusts often are utilized for tax savings and asset management, either as part of a Will, or in addition to a Will. A trustee is designated in the trust document to manage the property, assets and/or monies contained in the trust. If trusts are appropriate for you (and trusts might be of long-term duration), who would you want to be the trustee (or co-trustee): an individual such as your spouse, brother or sister, child or friend or a combination of several individuals? Who would be the successor trustee if the initial trustee fails or ceases to act? After your death, will that same trustee be appointed to act for wrapping up the affairs of the trust or overseeing trust management while assets are retained in trust for minor or disabled beneficiaries. While most people choose the same trustee to act while they are alive (but disabled) and after they are deceased, you may have reasons for wanting different trustees at those two different stages.

4. Specific Gifts. Do you wish to provide in your estate plan for cash gifts, percentage gifts, or gifts of specific items of personal property or real property to individuals or charity? If so, you should make a list of such individuals and organizations, paying careful attention to exact given names, spellings and addresses.

5. Plan for Distribution. How do you want the remainder of your estate to be divided and distributed upon your death? Do you want to divide your estate in percentages, equal shares, or some other specified share arrangement between your chosen beneficiaries? If one of your named beneficiaries should predecease you, should that person's share be given to his or her children, to some other person or persons, or should it lapse? If you have minor children, do you want all assets held and used for their collective needs until the youngest child attains a certain age, or do you want separate shares created for their own needs upon your death? At what age or ages should your beneficiaries receive their shares? This can be one specified age for all of each share, or different ages for proportionate shares.

6. Disaster. If all members of your immediate family (or the group of named beneficiaries) are deceased, to what individuals or charities should your assets be given?