

BASIC INFORMATION FOR PREPARATION OF DOCUMENTS

- _____ An overview or inventory of your combined estates. Please indicate what of your property is separate and what is community.

- _____ An overview of your present situation, such as age, marital status, birthdays, anniversary date, employment and other information you believe relevant to understanding your current family and work status. Also, information concerning any previous marriages, including names, dates, children, etc.

- _____ Names of the persons you wish to serve as the executor and trustee, and their respective successors. Also, the persons whom you wish to serve as your agent and alternate under the asset management power of attorney and the medical power of attorney.

- _____ Name of the person whom you would like to have serve as the guardian of the person of your minor children. This designation of a guardian in your will would be effective if you are the last surviving parent of minor children. In discussing this eventuality, you need to consider whether a divorce of the person you designate would affect your choice.

- _____ Any special bequests. These could be specific items that you wish to go to a particular person, or a bequest to a friend or other person who would not normally be one of your heirs.

- _____ Any charitable bequests to your church or another religious, educational or charitable institution. A tithe of your estate is always an appropriate gift and expression of faith, but the reality is that often your primary concern is to provide adequately for your spouse and family.

- _____ Disposition of the remainder of your estate. In planning, you need to think through various contingencies and decide what happens to your estate if the primary intended beneficiaries are no longer living.

- _____ Names and addresses of all members of each of your families, including parents, children, brothers and sisters, spouses of those persons (please include middle names, as well), and any other persons who may be mentioned in any of the legal documents. Also, do any of these individuals have special needs for which you would like to provide?

- _____ Names of other professionals whose services you retain, such as agents, accountants, lawyers, brokers, insurance agents, etc.