

INFORMATION NEEDED FOR ESTATE PLANNING

These are some of the decisions you should be thinking about before your appointment.

Who do you want to be in charge of your estate when you die?
(Personal Representative / Trustee) _____

If that person is unavailable? _____

Do you have minor children? _____ Yes _____ No

If yes, who do you want to be their guardian? _____

If that person is unavailable? (Successor Guardian) _____

If you want to leave your estate to your children, at what age(s) do you want them to get their shares? _____

Do you want their distribution to be contingent on anything? _____

If your children do not survive you, who do you want your estate to go to?

Are there other beneficiaries you want to include (i.e. charities, other people)? If so, complete the table below.

Name of Beneficiary	Percentage or Amount to Give	If this person does not survive you, do you want this share to go to this person's children? Yes or No	If not, then to who?

Who do you want to be able to make financial decisions on your behalf if you cannot make your own decisions?
(Attorney in Fact / Agent) _____

If that person is unavailable? (Successor Attorney in Fact / Agent) _____

Who do you want to be able to make health care decisions on your behalf if you cannot make your own decisions? (Attorney in Fact / Agent) _____

If that person is unavailable? (Successor Attorney in Fact / Agent) _____