

THE WHITE LAW FIRM
ESTATE PLANNING INFORMATION FORM (2016)

Your full name (as you'd like it to appear in your estate planning documents):

Address: _____

Phone: _____ Date of birth: _____

Marital status: _____

Financial status (employment status, annual net income and net worth):

Information concerning current spouse (full name, address, phone, date of birth, financial status, including employment status, annual net income and net worth):

If you have been married before, state your former spouse's full name, and the date of divorce or death of your former spouse:

For each of your children, please state:

- Full name
- Birthdate and current age
- Name(s) and birthdate(s) of any child's spouse or issue
- Is child of present or former marriage?
- Is child natural or adopted?
- Is child living or deceased?
- Any advances made to child in lieu of disposition in will?

Full name(s) and address(es) of your parents, if living:

Full name(s) and address(es) of your siblings, if living:

Full names and addresses of the people you would like as executor and alternate executor:

Full names and addresses of guardian(s) and alternate guardian(s) for minor child(ren), if any:

If a trust is to be established, give the full name, address, and relationship of the trustee and alternate trustee you would like to appoint:

If a trust is established, give the full name, address, and relationship of the beneficiaries you wish:

List your property and give its location, including:

- Personal effects, including vehicles, safe-deposit boxes, etc.:

- Location, account number, approximate balance of all bank/investment accounts:

- Location, policy number, and description of all life insurance:

- Identification and description of all retirement / benefit plans:

- Identify any debts owed to you:

- Address, ownership interest, mortgages/liens on, and value of any real property owned by you:

- Any interest owned by you in any business, including a sole proprietorship, partnership, or corporation:

Describe any debts owed by you including the nature of the debt; the date incurred; the amount and terms of repayment; to whom the debt is owed; and the security or collateral given for the debt:

Please describe any of the following that you may have executed:

- Prior wills or codicils;
- Any agreement that may affect provisions in a will, such as a prenuptial agreement, a contract to make a will, or an agreement incident to divorce;
- Divorce decree, decree of annulment, spousal support or alimony order.

State, in general terms, how you would like your property to pass upon your death. For example, you could say that you'd like all your property to go to your spouse, if your spouse survives you, and, if not, to all of your children in equal shares. If there are specific items of property that you want to be sure to leave to a specific person (a specific bequest), be sure to list them.

If a statutory, durable power of attorney is to be granted, give the full name, address, and relationship of the agent and alternate agent you would like to appoint:

If a medical power of attorney is to be granted, give the full name, address, and relationship of the agent and the alternate agent you would like to appoint:

If a living will (directive to physicians) is to be executed, please state your wishes regarding whether or not you would like non-palliative care provided to you in case you are diagnosed with a (a) terminal or (b) irreversible medical condition. In other words, do you wish to be kept alive under those conditions, or be permitted to die as peacefully as possible under the circumstances?
