

Planning
Your
Estate

CONFIDENTIAL

Personal Estate Planning Guide

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I. Who Are You?

A good estate plan begins with an understanding of who you are and what preferences, commitments, and obligations you have.

What is your legal name? _____ Date of Birth? _____

Do you use other names? If so, what are they? _____

Where do you live?

Where do you work?

Street: _____

Employer: _____

Apartment Number: _____

Street: _____

City: _____

Suite: _____

County: _____

City: _____

State: _____

State: _____

Zip: _____

Zip: _____

Phone: _____

Phone: _____

Email: _____

Spouse's Work Phone: _____

Are you a United States citizen? Y N

Are you: Single Married Widowed Divorced Separated

If married, what is your spouse's name: _____

Is your spouse a United States citizen? Y N Spouse's birthdate: _____

Have you (or your spouse) been married before? You _____ (Spouse _____)

Do you (or your spouse) have children by a previous marriage? You _____ (Spouse _____)

Do you have a Will? _____ If so, when was it made? _____

Does your spouse have a Will? _____ If so, when was it made? _____

Does anyone hold Power of Attorney for you? If so, who? _____

For your spouse? If so, who? _____

Do you (or your spouse) have a Living Will? You _____ (Spouse _____)

Are there any unusual circumstances you need to plan for in your Will?

Do you (or your spouse) anticipate *receiving* an inheritance which might affect the value of your estate?

If so, please describe: _____

II. What do you own?

Bank Accounts:	Current Value	*Owner
Checking	\$ _____	_____
Savings	\$ _____	_____
Certificates of Deposit	\$ _____	_____
Municipal Bonds	\$ _____	_____
Other Bonds	\$ _____	_____
Notes, Mortgages, owed to you/spouse	\$ _____	_____
Tangible Personal Property	\$ _____	_____
TOTAL	\$ _____	_____

Stocks and Mutual Funds:

Shares(#)	Name of Company	Date Aq'd	Cost	Value	*Owner
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____

Insurance and Annuities:

Company	Type	Face Amt	Insured	Beneficiary	Cash Value	*Owner
_____	_____	\$ _____	_____	_____	\$ _____	_____
_____	_____	\$ _____	_____	_____	\$ _____	_____
_____	_____	\$ _____	_____	_____	\$ _____	_____
_____	_____	\$ _____	_____	_____	\$ _____	_____
_____	_____	\$ _____	_____	_____	\$ _____	_____

Real Estate:	Value	Mortgage	Equity	*Owner
Residence	\$ _____	\$ _____	\$ _____	_____
Other Real Estate	\$ _____	\$ _____	\$ _____	_____
	\$ _____	\$ _____	\$ _____	_____
TOTALS	\$ _____	\$ _____	\$ _____	_____

* H=Husband W=Wife JT=Joint Tenancy CP=Community Property

Business Interests:

Name of Business: _____

Nature of Business: _____

Form of Business:

_____ Sole Proprietorship _____ Sub-chapter S Corporation _____ Other

_____ Partnership _____ Professional Corporation

_____ Corporation _____ Limited Liability Company

Net Profit (Before owner's earnings and taxes) 20_____ \$_____

Family Members Involved in the Business: _____

Business Continuation Arrangement:

_____ Continued by Heirs _____ Liquidated

_____ Sold to Surviving Owners _____ Other

_____ Sold to Key Employees

Benefit Plans:

Qualified Pension or Profit Sharing Plan: _____ Yes _____ No

Vested Value \$_____

Death Benefit \$_____

Primary Beneficiary: _____

Contingent Beneficiary: _____

IRA

_____ Yes _____ No

Type of Funding: _____

Current Value: \$_____

Death Benefit: \$_____

Primary Beneficiary: _____

Contingent Beneficiary: _____

Split-Dollar Plan: _____ Yes _____ No

Describe plan of insurance, death benefit, ownership, and beneficiary:

Deferred Compensation Agreement: _____ Yes _____ No

Describe provisions and funding: _____

Stock Bonus, Stock Option, or Thrift Plan: _____ Yes _____ No

Describe Provisions: _____

III. Who Are The People You Care About?

(Use next page for Spouse's answers.)

	Full Name (include Middle name)	Address	Date of Birth	Date of Death
Spouse				
Children				
Grandchildren				
Father				
Mother				
Siblings				
Nieces				
Nephews				

Other than family members, are there people or organizations you want to provide for in your Will?

(Include address)

(Use next page for Spouse's answers.)

Spouse's Responses to Part III.

	Full Name (include Middle name)	Address	Date of Birth	Date of Death
Spouse				
Children				
Grandchildren				
Father				
Mother				
Siblings				
Nieces				
Nephews				

Other than family members, are there people or organizations you want to provide for in your Will?

(Include address)

IV. When you leave, what is your Plan? (Please include Full name, address & phone number)

To whom do you want your property to go? (These are "Beneficiaries.")

First Choice: Spouse or _____ Address: _____

Second Choice: _____ Address: _____

Third Choice: _____ Address: _____

Who do you want to care for your minor children?(These are "Guardians.")

First Choice: Spouse or _____ Address: _____

Second Choice: _____ Address: _____

Third Choice: _____ Address: _____

Will your spouse need help managing money and property? If so, from whom?

First Choice: _____

Second Choice: _____

Who do you want to manage money and property for your minor children? (This is a "Trustee.")

First Choice: Spouse or _____ Address: _____

Second Choice: _____ Address: _____

Third Choice: _____ Address: _____

When should your children receive your money and property *free from supervision*?

First Share: _____

Second Share: _____

Third Share: _____

Who do you want to see that the terms of your Will are followed? (This is a "Personal Representative.")

First Choice: Spouse or _____ Address: _____

Second Choice: _____ Address: _____

Third Choice: _____ Address: _____

Do you want to leave any money or property to charity? _____ If so, please specify:

Who do you want to appoint as your agent for your Medical Power of Attorney? (**Name & Phone**)

Who do you want to appoint as your agent for your Financial Power of Attorney? (**Name & Address**)

Spouse's Responses to Part IV.

When you leave, what is your Plan? (Please include Full name, address & phone number)

To whom do you want your property to go? (These are "Beneficiaries.")

First Choice: Spouse or _____ Address: _____

Second Choice: _____ Address: _____

Third Choice: _____ Address: _____

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Gordon J. Williams, P.C., is a general legal practice in Colorado Springs, with emphasis on wills, trusts and estate matters, probate, guardianships and conservatorships. Gordon J. Williams is a graduate of the College of the University of Chicago and the University of Kansas School of Law and is a member of the Colorado Bar Association's Trust and Estate Section, the El Paso County Bar Association, the El Paso County Bar Association Probate Section, and the Colorado Springs Estate Council.

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