ESTATE PLANNING WORKSHEET The Law Office of Daintria W. McClure, CPA Estate Planning, Wills, Trusts and Probate

USING THIS ORGANIZER WILL ASSIST US IN DESIGNING AN ESTATE PLAN THAT MEETS YOUR GOALS. ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

IF POSSIBLE, PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE PRIOR TO YOUR APPOINTMENT VIA MAIL OR FAX.

GENERAL INFORMATION

HUSBAND'S INFORMATION

Legal name:			
Nickname/aka:			
County:			
Date of birth:			
Are you a U.S. citizen:			_ No
Social Security Number:			
Health:			
Employer/Position:			
Annual Income:			
Home phone:		Work phone	e
Home fax:		Work fax	
email address:			
Prior Marriage(s)	Yes		No
Date Married/How Terminated			
Date of Current Marriage:		Sta	te:
Prenuptial Agreement	Yes		No
Mother's name:		age:	estate size:
Health:			
Father's name:			
Health:			
Inheritance expected			
Planning in place			

WIFE'S INFORMATION

Legal name:				
Nickname/aka:				
County:				
Date of birth:				
Are you a U.S. citizen:				No
Social Security Number:				
Health:				
Employer/Position:				
Annual Income:				
or 1			XX7 1 1	
-			-	ne
Home fax:			Work fax	
email address:				
Prior Marriage(s)	Yes			No
Date Married/How Terminated				
Date of Current Marriage:			St	ate:
Prenuptial Agreement		Yes		No
Mother's name:			age:	estate size:
Health:				
Father's name:		age:		estate size:
Health:				
Inheritance expected				
Planning in place				

CHILDREN

Child 1:						
	Husband					
Date of B	irth:					
Married/I	Name of Spouse:					
Children((s) Names / Ages:				Age:	_
					Age:	_
					Age:	_
					Age:	_
Child 2:						
Parent:	Husband	Wife	Both	(circle one)		
Date of B	sirth:			_		
Married/I	Name of Spouse:					
Children((s) Names / Ages:				Age:	_
					Age:	_
					Age:	_
					Age:	_
Child 3						
Parent:	Husband	Wife	Both	(circle one)		
Date of B	Sirth:					
Married/1	Name of Spouse:					
Children((s) Names / Ages:				Age:	_
					Age:	_
					Age:	_
					- Age:	_

Child 4:					
Parent:	Husband	Wife	Both	(circle one)	
Date of B	irth:			_	
Married/I	Name of Spouse:				
Children(s) Names / Ages:				Age:
					Age:
					Age:
					Age: ———
Child 5:					
Parent:				(circle one)	
Date of B	irth:				
Married/I	Name of Spouse:				
Children(s) Names / Ages:				Age:
					Age:
					Age:
					Age: ———
Child 6:					
Parent:	Husband	Wife	Both	(circle one)	
Date of B	irth:			_	
Married/I	Name of Spouse:				
Children(s) Names / Ages:				Age:
					Age:
					Age:
					Age: ———

Any deceased children that left children of their own?	Yes	No
If yes: Name of Child and their children, if any:		
OTHER DEPENDANTS		
Do you now (or expect to) contribute to the suppo	ort of any other persons:	
Yes No		
Name:	Relationship:	
SPECIAL PROVISIONS		
Does any member of your family have a special ho	ealth (mental or physical) conditi	on:
Name:	Relationship:	
Nature of Condition:		

Real Estate	Please use these descriptions in the TYPE col	umn for your Real Estate intere	ests.
	Primary Residence Vacant Land Second Residence Vacation Home	Rental Home Commercial Property	
Туре	Location	Owner	Market Value (approximate)
		Co-Owned Husband Wife	

Ch	ase use these descriptions in the TYPE column ecking CD vings Money Market	for your cash investments.	
Туре	Institution	Owner	Account Value (approximate)
		Co-Owned Husband Wife	

Business	Please use the	lease use these descriptions in the TYPE column for any Businesses you may own.						
	General Partne Ltd. Partnersh	eral Partnership Corporation Sole Proprietorship Partnership Limited Liability Company						
Туре		Name	Owner	Company Value (your interest)				
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					
			Husband Wife					

Investments	Please use these descriptions in the TYPE column for your Investments.				
	Bonds Common Stock	Annuities Mutual Funds	Brokerage Account		
Туре	Co	ompany	Owner	Value (approximate)	
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		
			Co-Owned Husband Wife		

Retirement	Please use th	nese descriptions in the T	YPE column for your Retirement accounts.	
	401(k) 403(b)	IRA Qualified Plan	SEP/IRA Other	
Туре		Company	Owner	ccount Value pproximate)
			Husband Wife	

Insurance	Please use th	ease use these descriptions in the TYPE column for your Insurance policies.						
	Term Whole Life	Universal Life Variable Life	Group					
Туре		Company		Insured Life	Insurance Amount			
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				
				Husband Wife				

Personal Pr	roperty	Please list in the TYPE column personal property items that are valued more than \$5,000.						
		Home Furnishings	Jewelr	y	Boats	Art		
		Vehicles	Collec	tables	Antiques	Furs		
		Type			Va	ılue		
Liabilities	Please use the	ase use these descriptions in the TYPE column to list your current debts.						

Liabilities	Please use these descrip	ptions in the TY	PE column to list your current debts.	
	Home Mortgage Other Mortgage	Personal Equity Lo		
	Туре		Obligor	Balance Due
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	
			Husband Wife Joint	

SUMMARY OF VALUES

	Ar	nount*
ASSETS	Husband	Wife Total Value
Real Property		
Furniture and Personal Effects		
Automobiles, Boats and RV's		
Bank and Savings Accounts		
Stocks and Bonds		
Life Insurance and Annuities		
Retirement Plans		
Business Interests		
Money owed to you		
Anticipated Inheritance, Etc.		
Other Assets		
Total Assets:		

^{*} Joint Property values enter 1/2 in husband's column and 1/2 in wife's column.

DESIGN INFORMATION

PERSONS TO ACT FOR YOU:

GUARDIAN FOR MINOR CHILDREN: If you have any children under the age of 18, list in order of preference who you wish to be guardian.

who you wish to be guardian.	
Name and Address	Relationship
INITIAL TRUSTEE(S): Usually the Maker will be the Trustee of his or her o Allows you to continue to jointly control your assets	
Name and Address	Relationship
DISABILITY TRUSTEE: If you were unable to make decisions for yourself decisions for you with regard to your property and	
FOR HUSBAND	
Name and Address	Relationship
FOR WIFE Name and Address	Relationship
DEATH TRUSTEE: After your death, who do you want carrying out your desired, management of property for your beneficial FOR HUSBAND	
Name and Address	Relationship
FOR WIFE	
Name and Address	Relationship

POWER OF ATTORNEY: If you were unable to make financial decisions for yourself, who would you want to make those decisions for you?

HUSBAND'S AGENT		
Name	Relationship	Instructions or Guidelines
WIFE'S AGENT		
Name	Relationship	Instructions or Guidelines
Do you want to authorize your Financial Agent to mak		eriod of time you are
Husband: □ Yes □ No	Wife: □ Yes □ No	
Gifting Power Details:		
HEALTH CARE: If you were unable to make decision with regard to your medical t HUSBAND'S AGENT		t to make decisions for you
Name	Relationship	Instructions or Guidelines
WIFE'S AGENT		
Name	Relationship	Instructions or Guidelines
Do you want to authorize your Medical Agent to take weather than nursing home? Husband: Yes No	whatever steps are necessary to kee Wife:	
Do you want to provide that upon certification by 2 ph		
nay arrange for voluntary admission? Husband: TY		, 3

of others Disabled spouse needs and the needs of others equally. DISTRIBUTIONS OF PERSONAL PROPERTY AND SPECIFIC GIFTS USE OF PERSONAL PROPERTY MEMORANDUM: Do you want to provide that your personal property will be distributed pursuant to a written list you may prepare later? Any property not listed on the memorandum should be distributed to: FOR HUSBAND: Spouse, then children equally. Spouse, then other named individuals. Other named individuals. List on next line. FOR WIFE: Spouse, then other named individuals. Other named individuals. List on next line. SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charitic Indicate whether these gifts are to be made even if the other spouse is alive. FOR HUSBAND: Individual or Charity Amount or Property Contingent on Wife predeceasin	deration to:	during any period of time the cheft is inc	apacitated, the successor Trustee shall give primary
DISTRIBUTIONS OF PERSONAL PROPERTY AND SPECIFIC GIFTS USE OF PERSONAL PROPERTY MEMORANDUM: Do you want to provide that your personal property will be distributed pursuant to a written list you may prepare later?		-	☐ Disabled spouse and other spouse, and then needs
USE OF PERSONAL PROPERTY MEMORANDUM: Do you want to provide that your personal property will be distributed pursuant to a written list you may prepare later?		☐ Disabled spouse needs and the needs of	others equally.
distributed pursuant to a written list you may prepare later?		DISTRIBUTIONS OF PERSONAL PRO	OPERTY AND SPECIFIC GIFTS
FOR HUSBAND: Spouse, then children equally. To the balance of the trust. Spouse, then other named individuals. Children Other named individuals. List on next line. FOR WIFE: Spouse, then children equally. Children Spouse, then to balance of trust. To the balance of the trust. Other named individuals. List on next line. Spouse, then other named individuals. Other named individuals. List on next line. SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charitic Indicate whether these gifts are to be made even if the other spouse is alive. FOR HUSBAND: Amount or Property Contingent on Wife predeceasing Individual or Charity Amount or Property Contingent on Wife predeceasing the continuous or charitic Individual or Charity Amount or Property Contingent on Wife predeceasing Individual or Charity Contingent on Wife predeceasing Individual or Charity Contingent on Wife predeceasing Individual Or Charity Contingent Or Wife Predeceasing Individual Or C			
□ Spouse, then to balance of trust. □ To the balance of the trust. □ Spouse, then other named individuals. □ Other named individuals. List on next line. FOR WIFE: □ Spouse, then children equally. □ Children □ Spouse, then to balance of trust. □ To the balance of the trust. □ To the balance of the trust. □ Spouse, then other named individuals. □ Other named individuals. List on next line. SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charitic Indicate whether these gifts are to be made even if the other spouse is alive. FOR HUSBAND: Individual or Charity Amount or Property Contingent on Wife predeceasing the property of the predeceasing the property Contingent on Wife Predeceasing the Property Contingent On	Any property not lis	sted on the memorandum should be distribute	ed to:
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FOR WIFE: Spouse, then to balance of trust. Spouse, then other named individuals. Other named individuals. List on next line. SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charitic Indicate whether these gifts are to be made even if the other spouse is alive. FOR HUSBAND: Individual or Charity Amount or Property Contingent on Wife predeceasing FOR WIFE:		-	☐ To the balance of the trust.
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Specific GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charitie Indicate whether these gifts are to be made even if the other spouse is alive. FOR HUSBAND: Individual or Charity Amount or Property Contingent on Wife predeceasin FOR WIFE:	FOR WIFE:	☐ Spouse, then children equally.	☐ Children
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FOR WIFE:			
		rity Amount or P	roperty Contingent on Wife predeceasing?
FOR WIFE: Individual or Charity Amount or Property Contingent on Husband predeceasin			
	EOD WIEE.		
		rity Amount or Pr	roperty Contingent on Husband predeceasing?

PROVIDING FOR THE SURVIVING SPOUSE UPON DEATH OF FIRST SPOUSE TO DIE ☐ TO SURVIVING SPOUSE WITHOUT TAX PLANNING: We recognize this does not provide any tax planning which may result in our beneficiaries paying significant optional estate taxes. ☐ All to surviving spouse. % to surviving spouse. ☐ Minimum allowed by law to surviving spouse. □ DIVIDE INTO MARITAL AND FAMILY TRUSTS: Designed to maximize estate tax savings. To accomplish this an amount up to the "applicable exclusion amount" (currently \$2,000,000) will be transferred to the Family Trust and the balance, if any, to the Marital Trust. This is sometimes referred to as "A/B Trust Planning". The Marital Trust is sometimes referred to as the "A Trust" or "QTIP Trust". The Family Trust is sometimes referred to as the "B Trust", "By-Pass Trust" or "Credit Shelter Trust". Also provides protection for surviving spouse from creditors and predators. You decide how much control you want the surviving spouse to have. In the event of remarriage protects property for your heirs from a new spouse in case of death or divorce. MARITAL DEDUCTION FORMULA (OFFICE USE ONLY): ☐ Clayton Election ☐ Disclaimer Provision ☐ Marital Fractional ☐ Marital Pecuniary ☐ Credit Shelter Pecuniary **DESIGN OF MARITAL SHARE:** □ OUTRIGHT: We want to leave property outright to the surviving spouse. We recognize that this offers no protection from creditors or predators. Allows surviving spouse to leave property to whomever he or she wants. Also allows a new spouse to possibly make claim on property in case of death or divorce ☐ GENERAL APPOINTMENT TRUST: All income and principal are available to the surviving spouse upon demand. The surviving spouse is free to do as he or she pleases. This would include the ability to remove all property in the Marital Share from the trust. □ ALL INCOME – PRINCIPAL FOR NEEDS: All income is distributed to surviving spouse; principal is available for his or her needs (health, education and maintenance). **ONLY INCOME:** Only income is distributed to surviving spouse. Principal is not available to the surviving spouse. DESIGN OF FAMILY SHARE: □ ALL INCOME – PRINCIPAL FOR NEEDS: All income is distributed to surviving spouse; principal is

available for needs (health, education and maintenance).

Are descendants permissible beneficiaries of principal?_____

☐ INCOME AND PRINCIPAL FOR NEEDS: All income and principal is available for needs. Income may be accumulated and not distributed.

Are descendants permissible beneficiaries of income and/or principal?

□ ONLY INCOME: Only income is distributed to surviving spouse. Principal is not available to the surviving spouse.

WHO IS RESPONSIBLE FOR DETERMINING LIFETIME DISTRIBUTIONS: Is surviving spouse the sole trustee with a right to appoint cotrustee (surviving spouse then determines the management and distributions for his or her needs)? Do you wish to name someone to be the cotrustee with the surviving spouse?

If so, to whom may the surviving spouse distribute your property: Your descendants Your descendants and their spouses Your descendants, their spouses and charities Anyone, no limitations DIVIDE EQUALLY BETWEEN OUR CHILDREN AND THE DESCENDANTS OF ANY DECEASED CHILDREN: DIVIDE AMONG NAMED INDIVIDUALS and/or CHARITIES: HOW AND WHEN TO DISTRIBUTE MY PROPERTY: DISTRIBUTE OUTRIGHT TO OUR BENEFICIARIES: Provides no protection from creditors, predators, or from themselves. STRUCTURED TRUST: You determine how long the property is to remain in trust. During the period of time the property is held in trust it is available to the beneficiary for needs (health, education and maintenance). You may give written instructions to the trustee outlining guidelines to be followed in determining the beneficiary's needs. You may provide for a staggered distribution of principal; i.e. 1/3 at age 30 and balance at age 40. You decide who will manage the property and to carry out your distribution instructions. Does the beneficiary have a right to be a cotrustee and/or choose his or her own cotrustee? You decide how the trust is designed. List your desires:		POWER OF APPOINTMENT: Do you want the surviving spouse to be able to modify the way property ted upon his or her death?
Your descendants Your descendants and their spouses Your descendants and charities Your descendants, their spouses and charities Anyone, no limitations ISION OF PROPERTY UPON DEATH OF SECOND SPOUSE TO DIE DIVIDE EQUALLY BETWEEN OUR CHILDREN AND THE DESCENDANTS OF ANY DECEASED CHILDREN: DIVIDE AMONG NAMED INDIVIDUALS and/or CHARITIES: DIVIDE AMONG NAMED INDIVIDUALS and/or CHARITIES: DISTRIBUTE OUTRIGHT TO OUR BENEFICIARIES: Provides no protection from creditors, predators, or from themselves. STRUCTURED TRUST: You determine how long the property is to remain in trust. During the period of time the property is held in trust it is available to the beneficiary for needs (health, education and maintenance). You may give written instructions to the trustee outlining guidelines to be followed in determining the beneficiary's needs. You may provide for a staggered distribution of principal; i.e. 1/3 at age 30 and balance at age 40. You decide who will manage the property and to carry out your distribution instructions. Does the beneficiary have a right to be a cotrustee and/or choose	If so, to whom	may the surviving spouse distribute your property:
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REMOTE CONTINGENT BENEFICIARY: Who do you want to receive your property in the remote event that no one listed above is alive to receive your property. Determining the remote contingent beneficiary is not so important that it should cause you to delay completion of your entire estate plan. It can always be changed at a later date.

In the remote event no one listed above is alive to receive my property I want my property distributed as follows:

To each spouse's heirs-at-law.

One-half to Husband's heirs-at-law and one-half to Wife's heirs at law.

To the following named individuals and/or charities:

OTHER ITEMS TO INCLUDE OR DISCUSS: Obviously your estate plan should address all your hopes, fears, and wishes. Please list any other items you want included or want to discuss: