



Welcome to Braiterman Law Offices. You have requested our assistance in preparing a will for you. Preparing a will requires that you decide who you want to receive property you own at the time of your death and who you want to handle the necessary legal arrangements for your estate. If you have children who are still minors, you can nominate in your will who you want to be guardian for your children. Most people also use the time they are preparing their last will and testament to prepare estate documents for health and financial management in the event they become incompetent to do these things later in life.

In order for us to prepare your will, we need you to provide us with complete information on the attached sheet. The information will enable us to tell whether a simple will meets your needs and to prepare for an appropriate simple will ready for you to sign when you come in to meet with us. We will answer questions you have about your will when you come to meet with us to sign your will.

A simple will is sufficient for most people who want to leave their assets to a surviving spouse or to their children in equal measures. Specific bequests of particular items of property may also be made to other individuals or organizations, though this may introduce new considerations to be discussed.

A simple will when you pass away will be admitted through a probate process and supervised by a probate court. Many people wish to use more advanced planning tools that can avoid the cost and delay of a probate process using a revocable living trust. If you would like to discuss this option, please indicate on the last page of the form your interest in discussing it.

We strongly recommend health planning and financial powers of attorney documents. We will discuss fees for the work you request before completing any of that work that you would be responsible for paying. All fees are payable before any documents are signed.

Please send us this completed document, and we will call you with any questions we may have and to schedule an appointment.



Estate Planning Client Information

CLIENT INFORMATION: We first need to know about you.

Full Legal Name: _____

Prior names (maiden name, name change, aliases, etc) _____

Home Address:

Citizenship (if other than United States): _____

Date of Birth _____

Phone Number: Home: _____ Work: _____

Occupation: _____

Your home e-mail address: _____

Your work e-mail address: _____

Is it okay to call / write / e-mail you at home? Yes No

Is it okay to call / write / e-mail you at work? Yes No

Please describe any restrictions or special instructions you would like us to use on calling, writing, or e-mailing to your home and to your work:

CAUTION: If you indicate we can use any e-mail addresses or home and office numbers above, you should make sure that the e-mail box is secure and no one you wouldn't want to see privileged attorney information can access your materials. If you authorize Braiterman Law Offices to use e-mail, you assume whatever risks there may be of disclosure on your end of the communication.

SPOUSE OR PARTNER: It is best if we know about your spouse, partner, and household to know what legal rights others may have concerning your plans.

Your current marital status: _____

State in which your current marriage or civil union** occurred: _____

Date of current marriage or civil union: _____ same sex? Y N

Current Spouse's (Partner's**) Name: _____

Current Spouse's (Partner's) Address:

Spouse or Partner's Citizenship (if other than United States): _____

If you currently share your household with another adult (not your spouse or civil union partner), please give his/her name and date of birth, and the duration of living together:

Former Spouse's (Partner's) Name and Address (if known):

Other Former Spouses or Partners:

CHILDREN: It is vitally important that we have full and accurate information concerning ALL children (both natural and adopted) to do your estate plan.

| Name | Date of Birth | Address | Other Parent | Living/Deceased (date of death) |
|-------------|----------------------|----------------|---------------------|--|
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*** As to each **adopted** child above, supply a copy of final adoption papers if possible or attach additional information stating the date of final adoption, state of adoption, and contact information of the other legal parent of the adopted child. Provide any information you may have on the natural parent of the child.

Stepchildren's full names, addresses, dates of birth, and legal parents:

ASSETS: We need to know what you own to plan your estate.

| <u>Asset</u> | <u>Fair Market Value</u> | <u>Encumbrances</u> | <u>Co-owners</u> | <u>Beneficiaries</u> |
|--|--------------------------|---------------------|------------------|----------------------|
| House | | | | |
| Other Real Estate | | | | |
| Motor Vehicles (cars, boats, trailers) | | | | |
| Stocks and Bonds | | | | |
| Bank Accounts, CDs, Savings Accounts | | | | |
| Pension* | | | | |
| IRA, Keough, 401(k)* | | | | |
| Collections, art, jewelry | | | | |
| Life Insurance* | (Death benefit) | | | |
| Other (describe) | | | | |

*Assets like life insurance, pension, and 401K may pass by beneficiary designation on those accounts. Other assets like a car or house may pass to a co-owner at death. It is vital that you be sure of these designations on your assets, or provide us with documentation so we can advise whether changes need to be made to achieve your objectives.

PETS: Do you have pets that you think need to be given special attention in the event of your death?

If yes, give details including the name of the pet, type of animal and breed, amounts you want to consider leaving for the pet's care, and who you want to take charge of the pet.

Special things you would like us to know about particular pieces of property or how they should be handled:

Powers of Appointment: Do you hold any general or special powers of appointment?

_____ Yes _____ No _____ Don't Know

If yes, supply documents that create the power of appointment.

If you expect to receive large gifts or inheritances from other people, specify how much, from whom, and when you expect to receive it:

INCOME: What you earn may affect your estate plan.

Household income: Self: \$ _____ monthly / yearly gross

Spouse/Partner: \$ _____ monthly / yearly gross

CURRENT ESTATE PLANNING: If you have estate planning documents, we need to know, either to revise them or revoke them in conjunction with your new estate plan documents.

Do you currently have a will? _____ Yes _____ No

If yes, where is the original will now? _____

Do you currently have a Durable Power of Attorney for Health Care, a Durable Power of Attorney for Financial Matters, and a Declaration of Living Will?

_____ Yes _____ No If yes, where are those documents now?

If no, we recommend that we prepare these documents now while you are making these plans and will have the necessary witnesses at our office to make those documents
Would you like these documents prepared for you?

_____ Yes _____ No

ESTATE PLAN: We need to know what you want to do in your new estate plan.

If married, do you wish to nominate your spouse/partner as Executor of your estate?

_____ Yes _____ No

If no, please provide the name, address and relationship to you of your choice for Executor:

Choice for Backup Executor (name, address, relationship to you):

Choice for Guardian for Minor Children if the child's other parent dies before you (name, address, relationship to you):

Choice for Backup Guardian (name, address, relationship to you):

If you would like a Durable Power of Attorney for Health Care and Durable Power of Attorney for Financial Matters prepared for you, do you wish to name your spouse/partner as your agent to make necessary decisions for you?

_____ Yes _____ No

If no, please provide the name, address and relationship to you of your choice for Agent:

Choice for Alternate Agent (name, address, relationship to you):

Who do you wish to take your assets when you pass away?

- a. Do you want your spouse/partner to take all of your assets if he/she survives you?

____ Yes ____ No

- b. If your spouse/partner does not survive you, do you want your children to take your assets in equal shares?

____ Yes ____ No

- c. Are there any your children (natural born or adopted) whom you do **not** want to take any assets of your estate? ____ Yes ____ No

If yes, which one(s) do you want to exclude, and briefly state why.

- d. If one of your children dies before you, circle which you want:

(i) the children who survive you to take all of your assets; or

(ii) the children of your deceased child to take that child's share of assets; or

(iii) some other distribution (please describe):

- e. What other instructions do you wish to provide for your estate plan?
(Feel free to attach additional sheets if necessary.)

Probate Avoidance:

Estate planning opportunities now allow arrangements in your estate plan that can usually eliminate the need for your estate to go through a probate process. Typically, these options involve preparing revocable living trusts and then funding those trusts with all your assets so that your trust governs the handling of your assets upon your death without probate.

Effective estate planning with a revocable trust involves more time and expense at the outset, but can save many thousands of dollars to you or your survivors upon your death by avoiding probate proceedings.

Keep in mind that Probate Avoidance is different than tax planning and nursing home/Medicaid planning. Probate Avoidance does not insulate your assets from creditors.

If you want to discuss probate avoidance options, check here, and we will discuss that with you.

_____ Yes, I would like to discuss it.

Please list here any questions or concerns you have that you would like to discuss about your estate plan:

Please feel free to attach additional sheets to supplement any of your answers above.