

LEHNER LAW OFFICE

LIMITED LIABILITY COMPANY

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CLIENT INFORMATION WORKSHEET

(Required for Preparation Estate Plan)

CLIENTS		
	Husband	Wife
Name		
Address		
Phone # (s)		
e-mail		
SS #		
U.S. Citizen?		

CHILDREN				
Name	Address	Date of Birth	Adopted?	Child of Previous Relationship?

OTHER INTENDED BENEFICIARIES			
(may be individuals or institutions, including charities)			
Name	Address	Date of Birth (if minor)	Relationship

- State briefly how you would like your property distributed after death:

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GUARDIANS (for minor children)

After one parent is gone, the surviving parent will almost certainly be giving custody of any minor children. In the event that both parents were gone before one or more of your children reached the age of 18, who would you want to care for them? You may name an individual or couple. Often, folks will choose a family member, but you may choose guardians who are unrelated. When selecting guardians, consider the following: geographic location (would the children need to move), stability of the home (emotionally and financially), does the guardian(s) know your preferences (religious, parenting style, etc.). You can name almost anyone you'd like, but be thoughtful about your choice.

	Name(s)	Address	Phone Numbers	Relationship
First Choice				
Second Choice				
Third Choice				

TRUSTEE

Your plan includes a Contingent Trust. This means that after you are both gone, a Trust will inherit your estate for the benefit of your children. Using this tool, you can choose a person, a group of people, or an institution to act as Trustee.

	Name(s)		Name(s)		Name(s)
First Choice		Second Choice		Third Choice	

PERSONAL REPRESENTATIVE

When you are gone, who would you like to conclude your final affairs? Spouses usually name one another first.

	Husband		Wife	
	Name(s)	Address	Name(s)	Address
First				
Second				
Third				

ATTORNEY IN FACT

If you were to become incapacitated and unable to manage your financial affairs, who would you like to manage them for you? Usually spouses will name each other for their first choice.

	Husband		Wife	
	Name(s)	Address	Name(s)	Address
First				
Second				
Third				

WHEN YOU ARE FINISHED, PLEASE RETURN THIS FORM TO OUR OFFICE.