

**CONFIDENTIAL
ESTATE
PLANNING
INFORMATION**

REAGER & ADLER, PC
ATTORNEYS AND COUNSELORS AT LAW

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Existing Will(s): _____ Dated: _____

Location: _____

Contact: _____

At Home: _____ At Work: _____

FAMILY INFORMATION:

Name	Date of Birth	Social Security Number
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Yourself: _____

Spouse: _____

Children: _____

Grandchildren: _____

Previous Marriage(s): _____

Children: _____

Surviving Issue of Deceased Children: _____

Have you or any members of your family been seriously ill or disabled? _____

DISPOSITION OF ESTATE

Specific bequests of cash and/or other tangibles:

Beneficiary	Description
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Distribution of Residue:

Beneficiary	Description
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Secondary Beneficiary(ies) for any property listed above:

Beneficiary

Description

Beneficiary	Description

Do you wish to create a testamentary trust for any beneficiary who is a minor at the time of your death? _____

If yes, at what age do you wish for the trust to terminate? _____

In the event that the beneficiary(ies) should die before the trust estate is distributed to them, to whom would you like the trust assets distributed? _____

Are there any specific restrictions you would like placed on the trust assets? _____

SELECTION OF FIDUCIARIES

Name

City of Residence

Executor:

_____	_____
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Alternate Executor:

_____	_____
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Trustee:

_____	_____
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Alternate Trustee:

_____	_____
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Guardian of minor children:

_____	_____
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Alternate Guardian:

_____	_____
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FINANCIAL INFORMATION:

Real Estate:

Location: _____

How Owned: _____

Market Value: _____

Mortgage: _____

Personal Resources: *(please note how each account is owned)*

Cash/Savings Accounts: _____

Certificates of Deposit: _____

Treasury Notes/Bills: _____

Securities/Mutual Funds: _____

Life Insurance: _____

Bonds: _____

Investment Real Estate: _____

Significant Personal Effects: _____

Other: _____

GOVERNMENT RESOURCES:

Social Security: _____

Year Started: _____

Current Earned Income: _____

Veterans Benefits: _____

Service Connected Disability: _____
