

Do you presently have a will? Yes No

Do you presently have a trust? Yes No

If you have a Trust, what is the date of the Trust? _____

Are you interested in avoiding probate of your estate? Yes No

Were there any previous marriages? Yes No

Are any of your children from a previous marriage? Yes No

Do you or any of your children or other beneficiaries have disabilities, serious health problems or other special needs? Yes No

If yes, please describe briefly: _____

Do you own a business or a farm? Yes No

Are you a U.S. citizen? Yes No

Do you own a long-term care (nursing home) insurance policy? Yes No

What is the value of death benefits on life insurance? Insuring \$_____

INCOME/ASSET/LIABILITY INFORMATION

Please list your income/asset/liability information in the appropriate category below.
Attach a separate page if necessary.

INCOME:

Earned Monthly Income from Labor: _____

Monthly Social Security Income _____

Monthly Pension Income _____

Other Monthly Income _____

Type of Asset	Type of Property (Residential, Commercial, Manufacturing, Agricultural)	Current Value
REAL ESTATE:		
Personal Residence		
Vacant Land		
Income Property		

Vacation / Time Share		
Equity in Business:		
<input type="checkbox"/> Sole Prop.	<input type="checkbox"/> Partnership	
Notes and Loans Receivable		

Type of Asset			Current Value
Checking Accounts			
Savings Accounts, including Money Market Accounts			
Stocks, Bonds (Non IRA/Pension/401k, etc)			
Certificates of Deposit			
Automobiles			
Other Personal Property			
Annuities	<u>Owner</u>	<u>Beneficiary</u>	
IRA's			
Pension/Profit Sharing/401k			
Other Assets			
Total Assets			
LIABILITIES:			Amount Owed
Mortgage			
Credit Cards			
Other:			
Total Liabilities			

CHILDREN OR OTHER BENEFICIARIES

Name	Address/Phone	Date of Birth	Relationship

GIFT TAX RETURNS

Have gift tax returns ever been filed to report gifts made? _____ ***If YES, please bring copies of the returns to your appointment.

PEOPLE YOU TRUST

- PERSONAL REPRESENTATIVE.** The will should name a personal representative to probate the estate. (Personal representative is also sometimes referred to as executor or administrator.) (E.g., Sibling, with a child, relative, friend, or corporate trustee as alternate.

PERSONAL REPRESENTATIVE:

ALTERNATE:

SECOND ALTERNATE:

- SUCCESSOR TRUSTEE.** If you choose to avoid probate of your estate by executing a living trust during lifetime, a successor trustee should be named. The successor trustee would be responsible for managing assets if you were unable, to manage assets due to incompetency. The successor trustee would distribute assets to beneficiaries after death.

SUCCESSOR TRUSTEE:

ALTERNATE:

SECOND ALTERNATE:

- HEALTH CARE AGENT.** Who should be named to make decisions on your behalf including decisions regarding medical issues (i.e. medical consents, life support issues, and nursing home admission) if you

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were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent.

HEALTH CARE AGENT:

HCA ADDRESS:

HCA PHONE:

ALTERNATE :

ALTERNATE ADDRESS:

ALTERNATE PHONE:

SECOND ALTERNATE :

ALTERNATE ADDRESS:

ALTERNATE PHONE:

4. PROPERTY AGENT. Who should be named to make decisions on your behalf including decisions regarding property management issues (i.e. real estate, taxes, retirement, government benefits, etc.) if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative or your health care agent to be your property agent.

PROPERTY AGENT:

ALTERNATE:

SECOND ALTERNATE:

5. HIPAA. The Health Insurance Portability and Accountability Act is a privacy act that protects your medical information. Who should be named to find out information regarding your medical condition if you were injured and unable to give the medical staff permission to give out medical information.

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

WHO GETS WHAT

1. **SPECIFIC GIFTS.** Do you want to make charitable gifts, such as to a church or other institution? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?

2. Briefly describe where you would want assets remaining after any specific gifts are distributed. (Don't worry about tax planning or other considerations in answering this question. We'll consider those details later if needed.)

Equally among children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.

Equally among surviving children

As follows: _____

3. **ULTIMATE DISTRIBUTION.** It's terrible to think about, but you might want to provide for the distribution of your property if you nor your children/other beneficiaries named above survive (heirs at law; charity, etc.) _____

PLEASE COMPLETE THIS SECTION ONLY IF YOU HAVE MINOR BENEFICIARIES OR BENEFICIARIES WITH DISABILITIES

1. **GUARDIAN.** If you have minor children or a beneficiary with special needs, you may need to appoint a guardian. The guardian is responsible for the day-to-day care of the child. It is a good idea to name at least one alternate guardian to act if your first choice cannot serve. This is an important obligation, so make sure the appointed guardian agrees to accept this responsibility

GUARDIAN: _____

ALTERNATE: _____

2. **CHILDREN'S TRUSTEE.** You may need a trustee to manage assets for beneficiaries until they are capable of managing assets on their own. A trustee can keep the beneficiary's money invested wisely and use it for their education, support, etc., until they reach an age specified or until they no longer have special needs. The trustee can be a relative, friend, trust company, or other person or institution you trust to manage and distribute assets according to your wishes.

CHILDREN'S TRUSTEE: _____

ALTERNATE: _____

3. **AGE OF DISTRIBUTION.** If you do establish a trust to allow a third party to manage assets for beneficiaries, then it is necessary for you to decide when the beneficiaries will be mature enough to manage assets on their own. You may want to give each beneficiary his or her share at the time the beneficiary reaches a particular age. You may consider splitting the distribution, such as 1/2 at age 25 and the balance at age 30, or 1/3 at 21, 1/3 at 25, and 1/3 at 35. You may use any age or combination of ages that you choose. If you have a beneficiary with special needs or a child who may be subject to liability or creditor claims, you may choose to keep the assets in trust for your child's entire life.
