

Estate Planning Fact Sheet for a Single Person

Date Prepared _____

If you feel some items do not apply to you, or have questions regarding same, just leave the item blank.

General Info:

Full Legal Name _____

Home Address _____

Age _____

Birthdate _____

Home # _____

Work # _____

Cell # _____

Email _____

Occupation _____

US Citizen? Yes: No:

TX Resident? Yes: No:

Plan to remain TX resident?: Yes: No:

Child 1

Other Info / Special Needs

Name _____

Birthdate _____

Address _____

Address _____

Phone # _____

Married: Yes: No:

Children: Yes: No:

Child 2

Other Info / Special Needs

Name _____

Birthdate _____

Address _____

Address _____

Phone # _____

Married: Yes: No:

Children: Yes: No:

Child 3

Other Info / Special Needs

Name _____

Birthdate _____

Address _____

Address _____

Phone # _____

Married: Yes: No:

Children: Yes: No:

Child 4

Spouse or Other Info / Special Needs

Name _____

Birthdate _____

Address _____

Address _____

Phone # _____

Married: Yes: No:

Children: Yes: No:

Child 5

Spouse or Other Info / Special Needs

Name _____

Birthdate _____

Address _____

Address _____

Phone # _____

Married: Yes: No:

Children: Yes: No:

Additional Information

Have you ever executed a marital property agreement (e.g., prenuptial agreement or partition agreement) that may affect the ownership of your property? Yes: No:

Do you own real property (including any oil, gas, or mineral interests) outside of Texas? Yes: No:

Have you ever made a gift in excess of the federal annual exclusion amount (currently \$14,000) OR have previously filed a Federal Gift Tax Return (Form 709)? Yes: No:

Have you ever created a trust or are you a beneficiary of a trust? Yes: No:
 [If yes, please bring a copy of the relevant trust agreement(s) to our initial meeting]

Have you ever been divorced? Yes: No:
 If yes, please complete the following:

- i. Name of ex-spouse: _____
- ii. Date of divorce: _____
- iii. Place of divorce: _____

Have you had a spouse predecease you? Yes: No:
 If yes, please complete the following:

- i. Deceased spouse's name: _____
- ii. Date of death: _____
- iii. Residence at date of death: _____
- iv. Did spouse leave a Will: Yes No If yes, please provide us with a copy.

Balance Sheet

Please list below your major assets. Estimated values are fine. If any of your more substantial assets have a low basis in relation to their current value, please indicate.

	Basic Description	Approximate Value
Real Estate		
Cash / Marketable Securities		
Personal Property		
IRAs / Qualified Retirement Plans (include owner and beneficiary)		
Life Insurance (include owner and beneficiary)		
Intellectual Property (e.g. copyrights, patents)		
Liabilities		

Executor of Estate: *The person who has the duty to settle your estate. The executor handles the affairs of the estate, including filing tax returns, paying debts, managing assets and ultimately distributing probate assets to the estate beneficiaries. You may name two or more executors to act together if you wish. The executor may be a relative, a friend, a bank with an active trust department, or a private trust company.*

Appointments	Name and Relationship	Address and Phone number
Initial Executor		
First Alternate Executor		
Second Alternate Executor		

Trustee of Trusts: *if trusts are to be created under Will, handles the affairs of the trust, manages the trust assets, files the trust tax returns, and makes trust distribution decisions. This person or institution should be capable of making sound business and investment decisions, be available for the duration of the trust(s), and be sensitive to the financial needs of the beneficiaries.*

Appointments	Name and Relationship	Address and Phone number
Initial Trustee		
First Alternate Trustee		
Second Alternate Trustee		

Lifetime Trusts:

If you are interested in trusts designed to minimize estate taxes at your descendants' deaths and provide protection for them from divorce/remarriage and creditors, you can create trusts for their benefit that will last for their entire lifetimes. We typically allow each descendant to become co-trustee of his or her trust at one age, and sole trustee several years later. The most common ages selected are either 25 and 30, or 30 and 35. However, these ages can be any you select.

Please list the ages at which you're a descendant may become:

- (i) co-trustees _____ and
- (ii) sole trustee _____ of his or her trust.

Guardian: *If you have minor children, these are the persons who would have the responsibility for raising your minor children in the event of your death. This person may be different than the individuals named as executor or trustee, but should be a person (or couple) with whom you would entrust your children.*

Appointments	Name and Relationship	Address and Phone number
Initial Guardian		
First Alternate Guardian		

Durable Power of Attorney: *Designates an agent to make business and financial decisions for you. The agent will have authority to pay your bills, sell your assets, etc. Naming an agent can save a great deal in court costs and legal fees, but you should only name someone you trust completely. You may appoint multiple agents to act jointly or independently. Also, you can make the agent's authority effective immediately, or only upon your disability. We often recommend that you make the power of attorney effective immediately to avoid the need for your agents to convince third parties (e.g., stock brokers, bankers, title examiners) that you are disabled in order to use the power of attorney.*

Appointments	Name and Relationship	Address and Phone number
Initial Agent		
First Alternate Agent		

Second Alt. Agent		

Medical Power of Attorney: Designates an agent to make medical decisions for you, if you are unable to do so. You may also express a desire that you do not want your life prolonged by artificial means by signing a directive to physicians and family or surrogates, commonly known as a “living will.” Both of these documents are known as advance directives. Joint agents are permissible, but we recommend naming agents one-at-a-time.

Appointments	Name and Relationship	Address and Phone number
Initial Agent		
First Alternate Agent		
Second Alt. Agent		

Contingent Beneficiaries of your estate: The person(s) who would like to receive your estate if your spouse and children fail to survive you. This may be your nearest relatives, also known as your “heirs at law”, or you may name specific individuals (or charities).

Name and Relationship	Percentage	Address and Phone Number