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Dear Client,

Congratulations on deciding to take charge of your legal health by creating or updating your estate plan! Enclosed is an estate planning worksheet to help you think about the kinds of assets you may have and decide how to distribute them in your will. I have also enclosed a document on the three most important legal documents you can have in your estate plan, as well as a worksheet for the creation of a living will, if you have do not already have one.

Once you have completed the document, call my office and schedule a consultation, which can be in person or by telephone. I will then create your documents and give you an opportunity to review them. After that, you can come into my office to sign the documents in front of two witnesses and I in order to give it full legal effect. Generally speaking, the entire process takes less than 10 business days once we have had our consultation.

I look forward to working with you in creating your estate plan. Please feel free to call or email me questions at any time.

Your lawyer,

Lynda L. Hinkle, Esq.
Attorney at Law

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ESTATE PLANNING REVIEW

Your Information

Full legal name _____ Date of Birth _____

Home Address _____

Telephone _____ Fax (if any) _____

Email _____

Are you a United States citizen? _____

Spouse or Civil Union Partner's Information

Full legal name _____ Date of Birth _____

Home Address _____

Telephone _____ Fax (if any) _____

Email _____

Spouse's Citizenship? _____

Family Information

Children’s Names and Dates of Birth _____

Previous Spouse or Civil Union Partner(s) _____

(Please attach copy of divorce or dissolution decrees.)

Personal and Family Financial Assets

Detailed responses are not required. For example, shares in publically traded companies might be shown simply as “common stocks”. On the other hand, for property interests that are more or less unique, such as interests in real estate, greater detail would be helpful. In regard to real estate, please include location, how the title is held, and the character of the property (house, apartment house, shopping center, etc.).

Personal Residence:

Address _____

Description _____

How you hold title _____

FMV: _____ Mortgage Balance if any: _____

Mortgage Holder (s): _____

Mortgage Life Insurance? _____

List Other Real Property Owned (Vacation home, rental property, etc.)

Address _____

Description _____

How you hold title _____

FMV: _____ Mortgage Balance if any: _____

Mortgage Holder (s): _____

Mortgage Life Insurance? _____

Address _____

Description _____

How you hold title _____

FMV: _____ Mortgage Balance if any: _____

Mortgage Holder (s): _____

Mortgage Life Insurance? _____

Personal Property:

Automobiles _____

Household Items of no special value _____

Valuable jewellery (indicate if insured): _____

Other valuables to be included in the will:

Banking Information

(a) Cash on Hand _____

(b) Checking accounts and Money Market Accounts (include bank, account number and whether it is jointly held and with whom) _____

(c) Savings accounts (include bank, account number and whether it is jointly held and with whom) _____

(d) Certificates of Deposit: _____

(e) T-bills _____

Pension and Profit Sharing Plans

List all pension, profit sharing and IRA accounts

Account Data/Name: _____

Where held: _____ Vested _____ Current Value _____

Type: _____

Account Data/Name: _____

Where held: _____ Vested _____ Current Value _____

Type: _____

Account Data/Name: _____

Where held: _____ Vested _____ Current Value _____

Type: _____

Life Insurance Policies

List all insurance policies on your life

Company: _____ Address of company _____

_____ Policy # _____

Face amount of policies _____ Who owns it? _____

Beneficiaries _____

Cash value _____ Loans against it, if any _____

Company: _____ Address of company _____

_____ Policy # _____

Face amount of policies _____ Who owns it? _____

Beneficiaries _____

Cash value _____ Loans against it, if any _____

Life Insurance on Other People That You Own

Company: _____ Address of company _____

_____ Policy # _____

Face amount of policies _____ Insured: _____

Beneficiaries _____

Cash value _____ Loans against it, if any _____

Business Interests

Describe any interest you have in family or other businesses with limited shareholders. Include nature of the business, form of organization, whether you are active in its operations, and your estimate of its value: _____

Investment Assets

Please list any of the following that you own: publically traded stocks and corporate bonds, municipal bonds, U.S. Treasury notes and bonds, limited partnership interests, other investments: Indicate if it is owned by you alone or jointly held:

Other Interests of Current or Future Value

Please list any interests in trusts created by you or another person which you anticipate benefiting from, and any anticipated inheritances:

Liabilities

Please list any financial liabilities not reflected in the asset information you have provide above. If they are secured, please indicate the nature of the security.

Personal Estate Planning Objectives

Describe any personal objectives you have for your family and your estate.

Who are the people you must trust to take care of your affairs after your death? Who would you like to be your executor, in other words? Please choose two in order of preference.

Have you given a power of attorney to any person? If so, to whom and what is it's scope?

Have you signed a living will or durable health care power? If so, please provide copies.

If you are selecting a person to be guardian of your children in the event of your death, please list the person(s) and their addresses below. Please include at least one backup.

Date completed: _____

Client Signature _____

