

ESTATE PLANNING INFORMATION FORM

1. FAMILY INFORMATION

FIRST PERSON (PRINCIPAL)

<hr/> <i>Full Name</i>	<hr/> <i>Any Other Names Gone By</i>
<hr/> <i>Address</i>	<hr/> <i>Telephone Number(s)</i>
<hr/> <i>City, State, Zip</i>	<hr/> <i>E-Mail Address</i>
<hr/> <i>Date and Place of Birth</i>	<hr/> <i>Date and Place of Present Marriage</i>
<hr/> <i>Occupation</i>	<hr/> <i>When Established Domicile in Texas</i>
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<hr/>	
<i>General Notes</i>	

SECOND PERSON (SPOUSE)

<hr/> <i>Full Name</i>	<hr/> <i>Any Other Names Gone By</i>
<hr/> <i>Address</i>	<hr/> <i>Telephone Number(s)</i>
<hr/> <i>City, State, Zip</i>	<hr/> <i>E-Mail Address</i>
<hr/> <i>Date and Place of Birth</i>	<hr/> <i>Date and Place of Present Marriage</i>
<hr/> <i>Occupation</i>	<hr/> <i>When Established Domicile in Texas</i>
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<hr/>	
<hr/>	
<hr/>	
<i>General Notes</i>	

CHILDREN

C1

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

C2

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

C3

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

C4

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

C5

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

C6

<i>Name</i>	<i>Date of Birth</i>	<i>Parents: P, S, or both</i>
<i>Address</i>	<i>Telephone Number(s)</i>	
<i>City, State, Zip</i>	<i>E-Mail Address</i>	

FIDUCIARIES

F1

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

F2

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

F3

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

F4

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

F5

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

F6

<i>Name</i>	<i>Relationship</i>
<i>Address</i>	<i>Telephone Number(s)</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

FIDUCIARY CHOICES	<i>P</i>	<i>S</i>	FIDUCIARY CHOICES	<i>P</i>	<i>S</i>
Executor:	<i>S, C1 - C6, or F1 - F6</i>		Executor 2:	<i>S, C1 - C6, or F1 - F6</i>	
Executor 3:	<i>S, C1 - C6, or F1 - F6</i>		Executor 4:	<i>S, C1 - C6, or F1 - F6</i>	
Trustee:	<i>S, C1 - C6, or F1 - F6</i>		Trustee 2:	<i>S, C1 - C6, or F1 - F6</i>	
Trustee 3:	<i>S, C1 - C6, or F1 - F6</i>		Trustee 4:	<i>S, C1 - C6, or F1 - F6</i>	
Trust Protector:	<i>S, C1 - C6, or F1 - F6</i>		Trust Protector 2:	<i>S, C1 - C6, or F1 - F6</i>	
Trust Protector 3:	<i>S, C1 - C6, or F1 - F6</i>		Trust Protector 4:	<i>S, C1 - C6, or F1 - F6</i>	
Guardian Children:	<i>S, C1 - C6, or F1 - F6</i>		Guardian Children 2:	<i>S, C1 - C6, or F1 - F6</i>	
Guardian Children 3:	<i>S, C1 - C6, or F1 - F6</i>		Guardian Children 4:	<i>S, C1 - C6, or F1 - F6</i>	
Guardian Adult:	<i>S, C1 - C6, or F1 - F6</i>		Guardian Adult 2:	<i>S, C1 - C6, or F1 - F6</i>	
Guardian Adult 3:	<i>S, C1 - C6, or F1 - F6</i>		Guardian Adult 4:	<i>S, C1 - C6, or F1 - F6</i>	
Durable POA:	<i>S, C1 - C6, or F1 - F6</i>		Durable POA 2:	<i>S, C1 - C6, or F1 - F6</i>	
Durable POA 3:	<i>S, C1 - C6, or F1 - F6</i>		Durable POA 4:	<i>S, C1 - C6, or F1 - F6</i>	
Medical POA:	<i>S, C1 - C6, or F1 - F6</i>		Medical POA 2:	<i>S, C1 - C6, or F1 - F6</i>	
Medical POA 3:	<i>S, C1 - C6, or F1 - F6</i>		Medical POA 4:	<i>S, C1 - C6, or F1 - F6</i>	
HIPAA Authorization:	<i>S, C1 - C6, or F1 - F6</i>		HIPAA Auth 2:	<i>S, C1 - C6, or F1 - F6</i>	
HIPAA Auth 3:	<i>S, C1 - C6, or F1 - F6</i>		HIPAA Auth 4:	<i>S, C1 - C6, or F1 - F6</i>	
Disposition Agent:	<i>S, C1 - C6, or F1 - F6</i>		Disposition Agent 2:	<i>S, C1 - C6, or F1 - F6</i>	
Disposition Agent 3:	<i>S, C1 - C6, or F1 - F6</i>		Disposition Agent 4:	<i>S, C1 - C6, or F1 - F6</i>	

SPECIAL ARRANGEMENTS FOR MINOR CHILDREN

SPECIFIC AND CHARITABLE BEQUESTS

DISPOSITION OF THE REST OF THE ESTATE

ALTERNATE BENEFICIARIES FOR THE REST OF THE ESTATE
