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INSTRUCTIONS FOR
BASIC ESTATE PLANNING INFORMATION FORM

*[**NOTE:** You can download this form from the page at* **http://koeneckelaw.com/clients**, *open it in Adobe Acrobat, fill it out on your computer, and submit it to me electronically —* ***but if you try to fill it out in a Web browser, you will have to PRINT it either to paper or a new PDF, because the information will not be saved!****]*

This questionnaire is designed to get basic information about you, your family, and people who can act as your fiduciaries before our meeting.

For all people, please include relationship, addresses, phone numbers, and e-mails: but ONLY ENTER THEM ONCE FOR EACH PERSON.

1. Family Information

This basic information should be completed. USE FULL LEGAL NAMES THROUGHOUT (e.g., "John Jacob Jingleheimer Smith, also known as J.J. Smith"). For the information about your **children**, if they live at home leave the address blank. The extra telephone, address, and e-mail information is there to make things easier for your executor, but can be added later if necessary. **Guardians** are those people who would take care of your children if you (and your spouse, if any) are deceased: this is often a tough decision. If you are not sure, *pencil someone in now*. You can talk to them later, and we can always change it later, if needed. **Special Arrangements for Minor Children** only needs to be completed if there is something unique about a child or children you want to make sure is dealt with. **If you are not married, just ignore all the "Your Spouse" information and preferences.**

2. Fiduciary Information

"Fiduciaries" are people who act on your behalf in money matters. Your **Executor** is the person who will administer your estate: pay debts, collect assets, and distribute property. Usually the first choice is your surviving spouse, if you are married. It is important to have at least one alternative, in case he or she does not survive you! Your **Trustee** is the person who will keep, invest, and distribute funds for your heirs over a longer term. Often this will be the same person(s), in the same order, as are named Executor – but it does not have to be.

3. General Thoughts and Wishes

(Optional) A space for you to enter your thoughts about what you would like done with your estate, to give me a general idea of your intentions.

If you have any questions, please call me: I look forward to meeting with you to get the process moving. Thanks.

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BASIC ESTATE PLANNING INFORMATION FORM

All information that you provide is confidential and is protected from forced disclosure by the attorney-client privilege.

Date Prepared: _____

	You	Your Spouse
Full Name:		
Also known as:		
Preferred Name:		
Date of Birth:		
Place of Birth:		
U.S. Citizen?	Yes ☐ No ☐	Yes ☐ No ☐
Phone:		
EMail:		

Home Address: _____ County: _____

Home Phone: _____

Date and Place of Marriage: _____

Marital Property Agreement? Yes ☐ No ☐

Whom may I thank for referring you to me? _____

CHILDREN

If additional space is needed (i.e., for more children), list the same information for each child on a separate sheet. If any child is only one of yours, please mark that child's name with (Y) for Your child or (S) for Your Spouse's child.

	Child 1	Child 2	Child 3
Name:			
Birthdate:			
Address:			
Phone:			
E-Mail			
Spouse:			
# Children:			

	Child 4	Child 5	Child 6
Name:			
Birthdate:			
Address:			
Phone:			
E-Mail			
Spouse:			
# Children:			

If there are any special circumstances with respect to your children or grandchildren (special health needs, educational requirements, etc.) or any other people for whom you feel financially responsible, please describe below.

Prior Marriages: (If either of you were married before, please complete the following.)

	You	Your Spouse
Prior Spouse:		
How marriage terminated:		
Date marriage terminated:		
Children of that marriage:		

EXECUTORS, TRUSTEES, GUARDIANS, AND OTHER AGENTS

Executors:

Your executor has the duty to settle your estate. This includes paying debts, state or federal death or income taxes, and administration expenses, selling any assets that need to be sold, and distributing your property to the beneficiaries named in your will. The executor may be a relative, a friend, a bank with an active trust department, or a private trust company. The degree of business management ability required depends upon the size of your estate and the nature of your assets. For example, if your estate will include an asset that may be difficult to manage (e.g., a business, a farm or real estate investments), you may wish to name an executor with business or investment management experience for the types of assets in your estate. You may name two or more executors to act together if you wish. (Your spouse is usually named as the primary executor.)

While it is common to name the same person or institution to act as both executor, trustee, and guardian, this is not required.

	For You	For Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Trustees:

Your trustees will manage any trusts for your spouse or descendants. The trustees will be authorized to provide funds as needed for the beneficiary's health, maintenance, support and education. However, unless you also designate a trustee as guardian, the trustee is not authorized to personally take custody of your minor children. (If your will creates a trust for your spouse for tax-saving purposes, your spouse is usually named as the primary trustee.) Often these are the same as your above-named executors: if so, just enter "same as above."

	You	Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Guardians for You:

The financial power of attorney, the medical power of attorney, and the HIPAA Authorization described on the following pages are designed to eliminate the need for the appointment of a guardian for you. However, in unusual circumstances, a court-supervised guardianship may still be required for you. In that event, the guardian of your person is the person with responsibility for your daily living arrangements and health care decisions, while the guardian of your estate is the person with responsibility for your financial decisions. You may also disqualify specific persons from serving as your guardian. Usually, the persons you name as agents under your financial power of attorney are named guardians of your estate, while the persons you name as agents under your medical power of attorney are named guardians of your person. If you would prefer that, leave these entries blank.

	You	**Your Spouse**
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
Are there any persons you do **not** want to be appointed?		

Guardians for Minor Children:

If your spouse survives you, he or she is the natural guardian of your minor children. You may designate, in your will or in a separate instrument, a guardian for your minor children in the event your spouse does not survive you. The guardian has the responsibility for raising your children. A separate guardianship designation may be advisable if you have difficulty deciding upon a guardian or if you believe that you may change the guardian appointment before you change your will.

	You	**Your Spouse**
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
Are there any persons you do **not** want to be appointed?		

Durable Power of Attorney:

You may name someone as your agent or "attorney-in-fact" under this document. (It is "durable" because the agent's authority to act will not terminate if you become incapacitated.) The agent will have authority to pay your bills, sell your assets, etc., on your behalf. This can save a great deal in court costs and legal fees, but you should only name someone you trust completely. Two people can act together, but it is usually best to name one at a time. (Your spouse is usually named as the primary agent.)

	You	Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Medical Power of Attorney and HIPAA Authorizations:

You should name someone as your agent to make medical or other health care decisions for you (and give them the authority to receive medical information under HIPAA), if you ever become incapable of making these decisions yourself. The statutes authorizing these documents do not contemplate joint agents, so I recommend naming one at a time. (Your spouse is usually named as the primary agent.)

	You	Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Agent for Disposition of Remains:

An Agent for Disposition of Remains is the person you want to have authority over your funeral and bodily disposition. Usually, they are the same as the persons you name above under your medical power of attorney: if so, just enter "same as above."

	You	Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Agent for Disposition of Remains:

An Agent for Disposition of Remains is the person you want to have authority over your funeral and bodily disposition. Usually, they are the same as the persons you name above under your medical power of attorney: if so, just enter "same as above."

	You	Your Spouse
Primary:		
Relationship:		
Address:		
Phone:		
E-Mail:		
1st Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
2nd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		
	(optional)	
3rd Alternate:		
Relationship:		
Address:		
Phone:		
E-Mail:		

Appointments for Disposition of Remains: please indicate any wishes for your bodily disposition, funeral, and burial/interment that you would like to be **enforceable**:

☐ You ☐ Spouse	It is my will, desire, and wish and I so direct that I be buried in accordance with my station in life and in conformity with my religious beliefs, and that a suitable monument be erected to my memory. ***[OR]***
☐ You ☐ Spouse	It is my will, desire, and wish, and I so direct that my remains be cremated and that my cremains be interred or distributed at the discretion of my Agent to Control Disposition of Remains. ***[OR]***
☐ You	
☐ Spouse	

GENERAL THOUGHTS AND WISHES ABOUT YOUR ESTATES

Use the space below to describe any wishes you may have with respect to the disposition of your property on your deaths, or estate management in general:

You	Your Spouse