

BASIC ESTATE PLANNING FACT SHEET RELEVANT FAMILY MEMBERS

	Full Legal Name	Age	Address & Phone No.
<i>Wife:</i>			
<i>Husband:</i>			
<i>Child 1:</i>			
<i>Child 2:</i>			
<i>Child 3:</i>			
<i>Child 4:</i>			
<i>Other 1:</i>			
<i>Other 2:</i>			

Are you both U.S. citizens? Yes No

Are you both residents of Texas? Yes No

Do you plan to remain residents of Texas? Yes No

Date of marriage: ____/____/____

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

Have either of you ever made a gift in excess of the federal annual exclusion amount (currently \$18,000) OR previously filed a Federal Gift Tax Return (Form 709)? Yes No

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

Was any property you own subject to 8971 reporting? Yes No

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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 in the right column.

	Basic Description	Approximate Value	Low Basis
	<i>Real Estate</i>		
	<i>Cash/Marketable Securities</i>		
	<i>Personal Property</i>		
	<i>IRAs/Qualified Retirement Plans</i> <i>(include owner and beneficiary)</i>		
	<i>Life Insurance</i> <i>(include owner and beneficiary)</i>		
	<i>Other Assets</i> <i>(e.g., business interests)</i>		
	<i>Intellectual Property</i> <i>(e.g., copyrights, patents)</i>		
	<i>Liabilities</i>		

APPOINTMENTS

Executor of Estate (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 appoint co-executors)

	Name & Relation	Address & Phone No.
<i>Initial Executor</i>		
<i>Alternate Executor</i>		
<i>Second Alternate Executor</i>		

Guardian (if minor children)

	Name & Relation	Address & Phone No.
<i>Initial Guardian</i>		
<i>Alternate Guardian</i>		

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; you may appoint co-trustees)

	Name & Relation	Address & Phone No.
<i>Initial Trustee</i>		
<i>Alternate Trustee</i>		
<i>Second Alternate Trustee</i>		

APPOINTMENTS (continued)

Statutory Durable Power of Attorney (designates an agent to make business and financial decisions for you; you may appoint co-agents)

	Name & Relation	Address & Phone No.
<i>Initial Agent for Wife</i>		
<i>First Alternate Agent for Wife</i>		
<i>Second Alternate Agent for Wife</i>		
<i>Initial Agent for Husband</i>		
<i>First Alternate Agent for Husband</i>		
<i>Second Alternate Agent for Husband</i>		

Medical Power of Attorney (designates an agent to make health care decisions for you; you may appoint co-agents)

	Name & Relation	Address & Phone No.
<i>Initial Agent for Wife</i>		
<i>First Alternate Agent for Wife</i>		
<i>2nd Alternate Agent for Wife</i>		
<i>Initial Agent for Husband</i>		
<i>First Alternate Agent for Husband</i>		
<i>Second Alternate Agent for Husband</i>		

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Contingent Beneficiaries of your Estate (if your spouse and your children fail to survive you)

	Name & Relation	Address & Phone No.
<i>Wife:</i>		
<i>Husband:</i>		

Other Information: