

BASIC ESTATE PLANNING FACT SHEET RELEVANT FAMILY MEMBERS

| | Full Legal Name | Age | Address & Phone No. |
|-------------------|-----------------|-----|---------------------|
| <i>Your Name:</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 a U.S. citizen? Yes No

Are you a resident of Texas? Yes No

Do you plan to remain a resident of Texas? 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 \$18,000) OR 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) 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 (include owner and beneficiary)</i> | | | |
| <i>Life Insurance (include owner and beneficiary)</i> | | | |
| <i>Other Assets (e.g., business interests)</i> | | | |
| <i>Intellectual Property (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</i> | | |
| <i>First Alternate Agent</i> | | |
| <i>Second Alternate Agent</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</i> | | |
| <i>First Alternate Agent</i> | | |
| <i>2nd Alternate Agent</i> | | |

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

| | Name & Relation | Address & Phone No. |
|--------------------|-----------------|---------------------|
| <i>Primary:</i> | | |
| 1. | | |
| 2. | | |
| 3. | | |
| <i>Contingent:</i> | | |
| 1. | | |
| 2. | | |
| 3. | | |

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Other Information: