

BASIC ESTATE PLANNING FACT SHEET RELEVANT FAMILY MEMBERS

	Full Legal Name	Age	Address & Phone No.
<i>Your Name:</i>			
<i>Your Primary Beneficiaries:</i> 1. 2. 3. 4.			
<i>Your Contingent Beneficiaries:</i> 1. 2. 3. 4.			

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 any 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

FIZERBECK

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>		

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</i>		
<i>Second Alternate</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>Second Alternate Agent</i>		

Other Information: