

**PRELIMINARY ESTATE PLANNING INFORMATION**

- Legal names, dates of birth, social security #(s), addresses, etc., for you and your child(ren).

_____	_____
_____	_____
_____	_____
_____	_____

- **Guardian.** List your nominees for **Guardian** to take care of the physical and emotional needs of your minor children in the event of your untimely death. Select a first and second alternate.

\_\_\_\_\_

- **Trustee/Conservator.** List your nominees for **Trustee/Conservator** to manage your children's financial affairs after your death.

\_\_\_\_\_

- **Personal Representative.** List your nominees for **personal representative**. A personal representative manages your estate immediately after your death, gathers and distributes property, pays bills, file tax returns, etc. Select a first and second alternate.

\_\_\_\_\_

- Complete the following: A preliminary asset list with approximate value of each asset. Bring copies of deeds to real estate, bank account information, vehicle titles, life insurance policies, retirement documents, investment records, etc. to your initial appointment.

Real Estate: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bank Accounts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Vehicle(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Life Ins. Policies: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Retirement Accounts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- List your nominees to **make health care decisions** for you in the event you are unable to do so. You should select an alternate and a second alternate.

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