





## Appointments

1. **Successor Trustee.** The successor trustee would be responsible for managing assets if you were unable to do so. The successor trustee would manage assets in the event of your incapacity and would distribute assets to beneficiaries after death. (Assume that your Spouse is the first Successor Trustee. This person administers the trust when both you and your spouse have passed.)

Successor Trustee: \_\_\_\_\_ Alternate: \_\_\_\_\_

2. **Durable Power of Attorney Agent.\*** A Durable Power of Attorney will be prepared as part of your Estate Plan. This power enables your agent to conduct all your financial affairs if you become incapacitated temporarily. This power is no longer available upon your death or permanent incapacity, at that time, the successor trustee takes over.

Agent: \_\_\_\_\_ Alternate: \_\_\_\_\_

3. **Health Care Agent.\*** Who should be named to make medical decisions on your behalf including decisions regarding medical consents, life support issues, and nursing home admission if you were unable to make these decisions yourself? It is not necessary to appoint the same person who is your successor trustee or personal representative as your health care agent. (Include address and phone)

Health Care Agent: \_\_\_\_\_ Alternate: \_\_\_\_\_

\*Each Spouse may appoint different persons for these documents. Assume that the first choice for each spouse is one another.

## Plan of Distribution

1. **Specific Gifts.** Do you want to make charitable gifts, such as to a house of worship or other institution? Do you wish to make a special gift to a particular person, such as a piece of jewelry to a particular child?

\_\_\_\_\_

2. Briefly describe where you would want assets remaining after any specific gifts are distributed. (Don't worry about tax planning or other considerations in answering this question. We'll consider those details later if needed.)

All to spouse; then among children, and if a child didn't survive, the deceased child's share to the deceased child's children.

All to spouse, then equally among surviving children.

All to spouse, then \_\_\_\_\_

As follows:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Asset/Liability Information

Please list your asset/liability information in the appropriate category below. Attach a separate page if necessary.

Type of Asset	Title in Which Held (Husband sole, Wife sole, Joint with spouse, Joint with third party, Tenants in common, etc.)	Current Value		
<b>Real Estate</b> (Include type of property e.g., residential, agricultural, commercial, or manufacturing.)				
Personal Residence				
Vacant Land				
Other				
<b>Liquid Assets</b> Include account number and address where held.				
Cash on Hand				
Government and Publicly Traded Securities				
Unlisted Securities (Not Publicly Traded)				
Money Market Accounts				
Equity in Business Sole Prop.				
Partnership				
Notes and Loans Receivable				
Checking Accounts				
Savings Account				
Certificates of Deposit				
Automobiles				
Other Personal Property				
<b>Annuities</b>	<b>Owner</b>	<b>Beneficiary</b>	<b>Current Value</b>	
IRAs				
Pension/Profit Sharing				
Life Insurance			Cash Value	Death Benefit
Other Assets				
<b>Liabilities</b>	<b>Name Loan Taken In</b>	<b>Amount Owed</b>		