



PHILLIPS ESTATE LAW

trusted guidance

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CONFIDENTIAL
ESTATE PLANNING INFORMATION

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Referred By: _____

Personal Information _____

Full Name _____

Birthdate _____

Citizenship _____

Home Address _____

Cell Phone _____

Home Phone _____

Employer _____

E-mail Address _____

Dependents
(other than children) _____

Updates _____

The laws surrounding your estate planning can change without warning. In order to help keep our clients informed about the shifting legal landscape and how it might affect their planning, we publish a monthly blog. Would you like us to email you when we post a new article?

Yes No

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Children

<i>Name</i>	<i>Birthdate</i>	<i>Married (Y/N)</i>	<i>No. of Children</i>

General Information

Have you ever filed a gift tax return?

Do you own insurance on the life of any person other than yourself?

Do you own property outside the State of Washington?

If so, where and what kind:

Life Insurance

Number of policies:

Total face amount:

Approximate present cash value:

Owner(s):

Primary beneficiary(ies):

Contingent beneficiary(ies):

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Retirement Benefits

Employer Plans:

Type (401(k), profit sharing, ESOP, etc.) _____

Approximate balance(s): _____

Primary beneficiary(ies): _____

Contingent beneficiary(ies): _____

IRA:

Approximate balance(s): _____

Primary beneficiary(ies): _____

Contingent beneficiary(ies): _____

Advisors (name, contact info)

Investments: _____

Accountant: _____

Insurance: _____

Last Will and Testament

Fiduciaries (Personal Representative, Trustee and Guardian)

1. Personal Representative: The Personal Representative is the individual(s) or entity (*i.e.*, bank) designated to identify and collect assets of your estate, pay claims, expenses and obligations of the estate, settle the tax liability and distribute the estate assets as provided in your Will.

Name of individual(s) or entity to serve as
Personal Representative (PR) and as

(PR) _____

Successor Personal Representative (SPR):

(SPR) _____

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2. Trustee: The Trustee is the individual(s) or entity designated to hold, manage and distribute assets placed in any trust(s) established under your Will. A trust, if any, would typically be established for your children.

Name of individual(s) or entity to serve as Trustee (TR) and (TR) _____

Successor trustee (STR) of any trusts to be established for your children: (STR) _____

3. Guardian: The Guardian of the person is the individual(s) who will take custody of your minor children (*i.e.*, children under age 18), when there is no surviving parent. The Guardian's role generally is parental in nature, rather than financial. The Guardian and Trustee will coordinate with each other.

Name of individual(s) to serve as Guardian (G) or (G) _____

Successor Guardian (SG): (SG) _____

Dispositive Provisions

1. If you have no children. Please state your wishes as to which individuals, charities, etc., for whom you would like to provide, indicating the approximate interest each would have in your estate assets:

2. Provisions for Children. It is usually advisable to establish a trust in your Will to hold your estate for the benefit of your younger children upon your death. The provisions of the trust generally allow the Trustee to make payments for the health, support, maintenance and education of the children. At some point, however, a child's share is usually distributed to him or her outright, and the trust terminates. The termination should be at the age of ages at which the child can be expected to manage the funds independently. For example, one-half of a child's share could be distributed to the child at age 30 with the balance distributed at age 35. If you think that the use of a trust for the children is advisable, at what age or ages should the trust distributes your children their shares?

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3. Provisions for Other Intended Beneficiaries. Do you want to provide for individuals or entities (*i.e.*, charities) other than your descendants? If yes, please explain:

4. Provisions for Contingent Beneficiaries. If none of your descendants survives until the complete distribution of your estate, please name the individuals, or perhaps charitable organizations, to whom you would like to distribute your estate?

3. Special Concerns. Are there additional concerns or beneficiaries that have not been disclosed above?

Other Documents

Financial Durable Power of Attorney

The Financial Durable Power of Attorney allows you to appoint an individual(s) (*i.e.*, "the attorney-in-fact") to make decisions and take actions regarding your property in the event you are incapacitated. The Financial Durable Power of Attorney is designed to preclude the need for a guardianship proceeding

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in the event of incapacity and becomes effective immediately, or upon your disability or incompetence, as you determine appropriate.

Name of individual to serve as attorney-in-fact (AIF) and (AIF) _____

Successor attorney-in-fact (SAIF) (SAIF) _____

Personal and Health Care Power of Attorney

The Personal and Health Care Durable Power of Attorney allows the attorney-in-fact to make decisions regarding the medical treatment and non-treatment of the principal.

Name of individual to serve as attorney-in-fact (AIF) and (AIF) _____

Successor attorney-in-fact (SAIF) (SAIF) _____

Health Care Directive

The Health Care Directive is a statutory form designed to provide for the termination of artificial life support systems if you are diagnosed to be in a "terminal condition" or in a "permanent unconscious condition." Would you be interested in executing such a document?

Yes _____ / No _____

Anatomical Gift Statement

The Anatomical Gift Statement is a form that allows you to select which organs, if any, you would like to donate, to whom you would like to donate them, and select the manner of the disposal of your remains. Would you be interested in executing such a document?

Yes _____ / No _____

Existing Documents

Please provide us with copies of any existing estate planning documents, including Last Will and Testaments, Trust Agreements, Buy/Sell Agreements, Gift Tax Returns, Powers of Attorney, Living Wills, etc.

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Assets and Liabilities

Assets	Estimated Current Value
Cash (checking and savings accounts)	
Short-term investments (treasury bills, certificates of deposit, etc.)	
Publicly traded securities and bonds	
Closely held securities*	
Residence	
Vacation home	
Other real estate	
Partnerships*	
Accounts receivable	
Cash value of life insurance†	
Retirement benefits (total amount of Employer Plans and IRAs from page 3)	
Furnishings (including art work and antiques)**	
Automobiles**	
Boats**	
Other	
TOTAL ASSETS:	\$
Liabilities	Estimated Current Amount
Mortgage(s)	
Guarantees	
Loans, notes, etc.	
Other Obligations	
TOTAL LIABILITIES:	\$
ASSETS - LIABILITIES = NET WORTH	\$

* If controlling interest is owned in closely-held corporation or partnership, give details.

** Valued at fair market value (as opposed to replacement cost).

† Please list the current cash value of the policy, as opposed to its death benefit.