

NAME(S):

ADDRESS:

TELEPHONE NUMBER(S):

EMAIL ADDRESS(ES)

REAL PROPERTY YOU OWN:

FINANCIAL ACCOUNTS(name of institution and last 4 digits of account numbers):

Married?

Names of children (with dates of birth for minor children):

Who do you want to be the beneficiaries of your estate?

Who would be your alternate beneficiaries

If you have children who are minors:

At what age or ages would you want them to receive their inheritance?

Who would manage your children's money until the age of distribution?

Alternate(s)?

Who would take care of your children physically if they were still minors?

Alternate(s)?

Who would be the Trustee(s) to distribute your property (usually the same person is also the executor)?
(Name and city of residence)

Alternate Trustee(s)? (Name and city of residence)

Who would have power of attorney over your finances if you were incapacitated?

(For the power of attorney provide names and addresses)

Alternate agent? (name and address)

Do you have a preference for burial or cremation or other directions for funeral services?

In addition we will need the most recent grant deed (or warranty deed or quitclaim deed) to your house and any other real property (not the Deed of Trust)