

Legal Note: The Documents here are provided for your information and that of your immediate family only. You are not permitted to copy any document provided to you. Each of these Documents provided are intended as general assistance in simple legal matters only. No document is intended to be used for any item, transaction, or other matter, where the total value of the item, transaction or matter is worth more than \$ 5,000.00. You are not authorized to use any document for any transaction which is in excess of \$ 5,000.00 in value or is not a simple matter. As a guideline to the meaning of simple, consider the following: if you can complete the document without any questions, it is likely a simple matter. However, if you need to ask any questions, you should consult with your Plan attorney. Do not speculate about completion of the blanks in this matter.

The information provided in the documents, and the instructions provided with each document are not intended to constitute legal advice. These documents are intended to assist consumers in protecting themselves in certain simple transactions, without incurring expensive attorneys fees. If you need legal advice, Plan Attorneys will be happy to provide a free legal consultation, at no cost, to you as a Plan member. Understand that if you contact a Plan Attorney, he/she may not advise you as to how to complete your documents. They may only be retained to prepare documents for you which they deem to be proper in your situation.

Certain documents can be completed with either a pen or a typewriter, unless indicated otherwise in the specific instructions. **You should not make changes or alterations to any documents, once you have completed the document.** You must complete a new document fully, even if you wish to make any changes, even a small change. If you make any changes to a document, you cannot be sure that the change conforms to legal requirements. For example, changes to a will, in some circumstances, may void the entire will, even if you intended to make the changes. Thus, it is a safer practice to make a new document, if you intend to make any changes.

If there are blanks which are not used or which contain no information, place an X, or a line through the blank. This ensures that no person can make unauthorized modifications to a document, by simply completing the blanks, and changing the entire crux of the document.

Certain documents may require a notary. Notaries are certified by each state, and can only operate in the states in which they are licensed to operate. An invalid notary may invalidate your document. Notaries serve the purpose of verifying that the signature of the person signing the document, is in fact, the person claiming to have signed the document. Certain institutions require a notary, even when state law does not. Be sure to check with the parties with whom you are dealing to see if they will require a notary. Banks often require notaries.

If you believe that you must record a document, you should consult with a Plan Attorney. No document provided here is intended for recording, and any such document must be prepared by a Plan Attorney. We have not included certain documents, despite repeated requests, because these documents require the skill and expertise of an attorney. These include trusts, deeds, Mortgages, Escrow Agreements and other documents. Always consult a Plan Attorney before drafting one of these documents on your own.

ESTATE PLANNING WORKSHEET

Prepared on: _____, _____

1. **PERSONAL INFORMATION:** The person preparing the Will needs to know some personal information about the Willmaker, including marital status and whether the Willmaker has any children.

Name: _____

Address: _____

Phone: Home: _____ Work: _____

SSN: _____-_____-_____

Date of Birth: ____/____/_____

Employer Name: _____

Marital Status: _____

Children: _____

2. **VALUE OF THE ESTATE:** The value of state assets is needed to determine whether "estate taxes" may be an important consideration in the preparation of a will (or living trust). Although federal estate taxes are not usually a factor in estates of less than \$600,000, it may become important to consider more complex estate planning techniques in estates of \$450,000 or more. The manner in which assets are held (e.g., "jointly" or "in one name only") is also important in determining who will receive certain property (i.e., generally, "joint" property goes to the "surviving" joint tenant regardless of what the will may provide).

The net value of my estate assets, after deducting my debts and liabilities is \$_____.

3. **DISTRIBUTION OF THE ESTATE ASSETS:** The persons or organizations (beneficiaries) who will receive the assets of the estate must be identified.

First Priority. My first priority for my spouse.

4. **EXECUTOR:** An executor is the person or entity in a Will who has the responsibility to carry out the terms of the Will (i.e., collect the Willmaker's assets, pay the debts, and distribute the remaining assets to the beneficiaries). In some states, the executor is also known as a "personal representative".

First Choice:

Name: _____

City: _____

State/Province: _____

This Summary is not an official part of your document. It contains highlights of the important information that has been entered into the document.

**SUMMARY
of the
ESTATE PLANNING WORKSHEET**

DATE PREPARED

WILLMAKER

EXECUTOR

DISTRIBUTIONS OF ESTATE ASSETS

My first priority is to provide for my spouse.