

# Provide & Protect

A Guide to Planning  
Your Will and Trust



*Important Life And Death Decisions*



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## I. You & Your Family

**Please tell us about you and your family.** Print names in ink, not pencil.  
Spell names exactly as you want them to appear in your estate documents.  
Use full legal names, not nicknames.

### YOUR PERSONAL INFORMATION

Date \_\_\_\_\_

Your Full Legal Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender  Male  Female

**Present marital status:**

Married  Single  Divorced  Legally Separated  Widowed

If you are widowed, what date did this occur? \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Employer \_\_\_\_\_

Job Title \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

**Are you a U.S. Citizen or Lawful Permanent Resident?**

No  Born in the U.S.  Naturalized  LPR

**Check which documents you presently have:**

Will

Living Will

Living Trust

Durable Power of Attorney/Health Care

Durable Power of Attorney/Finances



## Your Spouse

Spouse's Full Legal Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender  Male  Female

### Have you previously been married?

Yes  No

Has your spouse passed away?

Yes  No

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Employer \_\_\_\_\_

Job Title \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

### Is your spouse a U.S. Citizen or Lawful Permanent Resident?

No  Born in the U.S.  Naturalized  LPR

### Check which documents your Spouse presently has:

Will

Living Will

Living Trust

Durable Power of Attorney/Health Care

Durable Power of Attorney/Finances

### Do you or your spouse have a Prenuptial agreement that identifies and disposes of separate spousal property? (If yes, attach a copy.)

Yes  No

## Religious Affiliation

Religious Organization \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_



## Your Children

Please list *all* children, whether minors or adults, *including deceased children and children of a prior marriage*. If you need more space, attach additional pages. If you wish to exclude a child as a beneficiary of your estate, check the "Exclude" box. If you have no children, write "NONE."

**1. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

**Marital Status**

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Origin**

Child of Present Marriage  Child of Prior Marriage  Deceased

**2. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

**Marital Status**

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Origin**

Child of Present Marriage  Child of Prior Marriage  Deceased

**3. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

**Marital Status**

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Origin**

Child of Present Marriage  Child of Prior Marriage  Deceased

## II. Your Contacts & Healthcare

### YOUR EXECUTOR

Your executor is the manager of your estate. Because he or she will make many decisions about the management and distribution of your estate, you should select a trusted person who understands your circumstances. An executor will usually complete eight separate steps to ensure an orderly transfer of all of your property to the right individuals.

1. Submit your will to the probate court
2. Locate your heirs
3. Determine your estate assets and values
4. Pay bills and the estate attorney
5. Make debt payments
6. Resolve any estate controversies
7. File your income and estate tax returns
8. Distribute your assets to heirs

Please name your executor and alternate executor.

Executor \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Your Alternate Executor

In case the person above is unable to serve, please name an Alternate Executor.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship \_\_\_\_\_



## YOUR GUARDIAN FOR MINOR CHILDREN

Guardian \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Your Alternate Guardian

Guardian \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship \_\_\_\_\_

## YOUR HEALTHCARE REPRESENTATIVE

### Power of Attorney For Healthcare

Healthcare Power of Attorney \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Alternate Power of Attorney for Healthcare

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### III. Your Finances

Please list all of your assets and liabilities. This will help your advisor plan your estate. Most people learn at the end of this exercise that they are worth more than they think!

Asset	\$ Total Value of Asset	Check If Joint Property	Check If Your Property	Check if your Spouse's Property
Example Property	\$298,000		✓	
<b>Real Estate</b>				
Main Residence Address				
Second Residence Address				
Vacation Home				
<b>Checking Accounts</b>				
Bank, Account Number				
<b>Savings Accounts/ CDs/ Money Market Funds/Credit Union Accounts</b>				
Bank, Account Number				
Tax Sheltered Annuity— not in Retirement Plan				





Asset	\$ Total Value of Asset	Check If Joint Property	Check If Your Property	Check if your Spouse's Property
<b>Investments</b>				
Bonds or Bond Fund Custodian, Account Number				
Stocks or Stock Fund Custodian, Account Number				
Saving Bonds				
<b>Personal Property</b>				
Furniture/Household Furnishings				
Tools & Equipment				
Antiques/Collections				
Jewelry				
Automobiles/Vehicles				
Business Interests				
Life Insurance— Face Amount/Death Benefit				
Retirement (IRA/401(k)/403(b)) Custodian, Account Number				
Miscellaneous				
<b>Total Assets: \$</b>				



Liabilities	\$ Total Amount of Debt	Check If Joint Debt	Check If Your Debt	Check if your Spouse's Debt
Mortgage on Personal Residence				
Mortgage on Second Residence				
Mortgage on Vacation Home				
Vehicle Debts				
Charge Accounts				
Installment Contracts				
Loans on Life Insurance				
Other Debts				
<b>Total Liabilities/Debts: \$</b>				
<b>TOTAL ESTATE: \$ (Assets Less Liabilities)</b>				

Sources of your Property

## IV. Your Estate Plan

### 1. SIMPLE WILL – MARRIED COUPLE

#### First Estate — Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

### 2. SIMPLE WILL – SINGLE/SURVIVING SPOUSE

#### Specific Bequests

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Residue of Estate

Percent of residue to family or to charities.

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

### 3. WILL WITH TRUST FOR CHILDREN – MARRIED COUPLE

#### Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

### 4. WILL WITH TRUST FOR CHILDREN – SINGLE/SURVIVING SPOUSE

#### Specific Bequests

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Name, City and State of Trustee

Primary Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ eMail \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

Age for ending trust and distributing principal to children \_\_\_\_\_

## 5. "GIVE IT TWICE" TRUST FOR FAMILY — MARRIED COUPLE

A married couple with an estate below the Federal exemption amount may desire a simple will. The first estate may include specific bequests to children or charity with the balance transferred outright to the surviving spouse.

### First Estate — Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

## 6. "GIVE IT TWICE" TRUST FOR FAMILY — SINGLE/SURVIVING SPOUSE

### Specific Bequests

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

## Residue of Surviving Spouse's Estate

Percentage of residue to family or to charities.

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

Another popular option for the estate of a surviving spouse is to divide the second estate into two parts. The first portion of the estate is given to the children when you pass away. The other part is transferred to a "Give It Twice" Trust. This is a charitable remainder unitrust that pays 5% each year to children for 20 years (5% times 20 years equals 100% — or you may select 6% for 18 years). After paying income to children for 20 years, the trust corpus is given to favorite charities. If you select this option, please choose the portion outright and the part in the "Give It Twice" Trust (the total of the two percentages will equal 100%).

**Outright to Children** \_\_\_\_\_ %    **To "Give It Twice" Trust** \_\_\_\_\_ %

## Children In Trust

**Children to receive trust income — % Share, Legal Name, City and State**

1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

## Charities at the End of The Trust

**Charities to receive trust remainder — % Share, Legal Name, City and State**

1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____



## Sample Bequest Language

We have provided some basic bequest language to assist you and your attorney.

### 1. BEQUEST OF A SPECIFIC DOLLAR AMOUNT

“I hereby, give, devise and bequeath [\$Dollars] to [Organization], a non-profit organization located at [Address], Federal Tax ID # \_\_\_\_\_, for [Organization’s] general use and purpose.”

### 2. BEQUEST OF SPECIFIC PERSONAL PROPERTY

“I hereby, give, devise and bequeath [Description of Property] to [Organization], a non-profit organization located at [Address], Federal Tax ID # \_\_\_\_\_, for [Organization’s] general use and purposes.”

“I hereby, give, devise and bequeath [Percentage of Your Estate] to [Organization], a non-profit organization located at [Address], Federal Tax ID # \_\_\_\_\_, for [Organization’s] general use and purposes.”

### 3. BEQUEST OF SPECIFIC REAL ESTATE

“I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at [Address or Description of Property] to [Organization], a non-profit organization located at [Address], Federal Tax ID # \_\_\_\_\_, for [Organization’s] general use and purposes.”

### 4. BEQUEST OF PERCENTAGE OF AN ESTATE

“I hereby, give, devise and bequeath [Percentage of Your Estate] to [Organization], a non-profit organization located at [Address], Federal Tax ID # \_\_\_\_\_, for [Organization’s] general use and purpose.”

### Disclosure on Attorneys and This Charity

*Thank you for completing this form. It is offered by us to you as an educational service. While we attempt to provide helpful estate and financial background, we are not able to offer specific legal advice on your personal situation. Because you may have special needs, we know that you will want to contact your own attorney. He or she will be your independent advisor and will have an obligation of trust and confidence to you. With the advice of your independent attorney, you may have a customized estate plan that truly fulfills your unique family, healthcare, estate and planning circumstances.*



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