

Information Necessary to Draft Your Estate Planning Documents

1. FULL NAME (as you wish it to appear in documents): _____

2. Home Phone: _____ Email: _____

Address on documents: _____, Mi. 48 _____

3. SPOUSE'S NAME (as you wish it to appear in documents): _____

4. SPOUSE'S email: _____

5. CHILDREN: Please list all adopted and biological children:

6. BENEFICIARIES: Please list the full names of the people you wish to give your assets to and the proportion in which you wish to give them (Specific bequests of heirlooms and the like will be addressed separately). Please list the age of any minors.

7. GUARDIANS/TRUSTEES: List the names of the persons you wish to be alternate:

Trustee(s)/Personal Representative(s) 1st alternate: _____

SSN: _____ DOB: _____

2nd alternate: _____

3rd alternate: _____

8. CHARITIES: Please list the full names of any charities, trusts, or foundations you wish to give to and the proportion you wish to give: _____

9. LIMITATIONS: Are there any limitations, restrictions, or qualifications you wish to put on any gifts? _____

Circle age if you wish a children or grand children's trust to age 25? 30? 35? 40?

10. PREDECEASED BENEFICIARIES: [Circle One] If a beneficiary predeceases you, do you wish (a) the children of a deceased beneficiary to take that beneficiaries share, OR (b) for the share to be redistributed to surviving beneficiaries, OR (c) for an alternative person: _____ to take?

11. Do you own a business? Partnership interest? Real estate other than your house? [] Yes: Describe: _____; [] No.

NOTE: Please attach a copy of the most recent tax return, deed/s on all real estate; and bring the corporate record books of any business. It is extremely important that you review the legal descriptions on any quit claim deeds to the trust and be sure to tell me about any property you sold on land contract, even to relatives. Please order change of beneficiary forms from all accounts where beneficiaries take an interest, including annuities, life insurance, CD's, IRA's and 401K's. We can review the change forms at the time of signing if the forms arrive in time. If we do not sign the documents at my office, please make arrangements to have a friend or neighbor available for witnessing the documents provided that they are not related to you. See me for details.

**I do not generally recommend co-trustees for logistical reasons. I generally do recommend that the trustee ranking be duplicated for the conservator, patient advocate and the power of attorney.

“Helping Some of Michigan's Wealthiest Families Protect and Grow Their Estate since 1990”

CHARLES KLEINBROOK, P.C.
Attorney and Counselor at Law
29445 Beck Road, Suite A205
Wixom, MI 48393
(248) 352-9569 FAX (248) 468-0306
Email: MrChip1234@aol.com