

VOLUNTARY INFORMATION REQUESTED FOR  
WILL AND ESTATE PLANNING CLIENTS

       CHECK HERE IF YOU DO NOT WISH FOR THE FOLLOWING  
INFORMATION TO BE DISCLOSED TO YOUR SPOUSE

We would appreciate your filling out the following information to assist us in preparation of Wills, Trusts and for possible later assistance in the administration of your Estate. Please print your answers to the following questions. If you are unsure as to any information, please indicate with a questions mark (?). Any incomplete or unsure information can be provided at a later time.

PLEASE PRINT

1. Your Full Name: \_\_\_\_\_
2. Your Spouse's Full Name: \_\_\_\_\_
3. We need the following information on all of your natural or adopted children (not step children) whether or not you intend to make them beneficiaries and whether or not they are alive.

<u>FULL NAME</u>	<u>ADDRESS</u>	<u>OVER 18</u>	<u>DECEASED</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. We need the following information on all other individuals (including step children or other relatives) or charities you intend to make beneficiaries.

<u>FULL NAME</u>	<u>ADDRESS</u>	<u>RELATIONSHIP</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. If you have picked a Personal Representative and Alternate Personal Representative, list their names and addresses and relationships:

Personal Representative: \_\_\_\_\_  
Alternate Personal Representative: \_\_\_\_\_

6. If you have minor children, you may appoint a Testamentary Guardian, subject to Court

approval. If you have come to a decision on that person, please list that person's name, address and relationship below:

7. If you are establishing a Trust, you will need to appoint a Trustee, and you may appoint an Alternate or Successor Trustee. If you have come to a decision on these, please list the name, address and relationship for each person below:

Trustee: \_\_\_\_\_  
Alternate Trustee: \_\_\_\_\_

8. If you have not chosen a bank or trust company as a Personal Representative of your estate and would like additional information regarding this, please check here \_\_\_\_\_

9. If you wish to discuss the estate tax consequences of your estate, please provide the following information:

- a. If you died today, what would be the total value (fair market value - not asking price) of all assets in you name alone (not jointly with your spouse)? \_\_\_\_\_
- b. If both you and your spouse died today, what would be the total value of your estate and your spouse's estate (fair market value of all assets in your name alone, your spouse's name alone and you and your spouse jointly)? \_\_\_\_\_
- c. What is the fair market value of all assets held jointly by you and any person not your spouse (including partnerships and custodial bank accounts)? \_\_\_\_\_
- d. Are there any other assets that you are unsure of, such as Trust accounts, etc? If so, please check here. \_\_\_\_\_

10. It is possible to avoid the administration of an estate by setting up an Inter Vivos Trust. Such a Trust may be of interest to you. If so, please check here so that we can discuss this. \_\_\_\_\_

11. Our minimum fees for simple mutual wills is \$150.00 for one and \$275.00 for two (husband and wife). Our minimum fee for a Revocable Inter Vivos Trust is \$1,000.00. Tax and other advice as well as variations of these documents are issues we are happy to discuss with you during your initial conference.

We look forward to working with you on this important matter and appreciate the trust you are placing with this firm.

Very truly yours,

James F. McCollum, P.L.

I have read the forgoing and filled out the information to the best of my ability. I agree to the fees set out herein.