

SINGLE ESTATE PLANNING
Schwarz & Harris, P.A.

Attorneys at Law

DATE _____

Individual's Legal Name: _____

Citizen of US? ___ Yes ___ No **Where?** _____

Home Address: _____

City: _____ **State:** _____ **Zip:** _____

Home Phone: _____ **Cell Phone:** _____

Email Address: _____

Do you want to be ___ **Buried? If so, where?** _____ **Prepaid?** _____
or

Do you want to be ___ **Cremated? Prepaid?** _____ **If so, where do you want your ashes to go?**

Explain: _____

Do you have any living child? ___ Yes ___ No

Do you have a deceased child? ___ Yes ___ No _____
Child's Name

Please list all living children below.

1. _____
Child's Name

Address
_____ Age: _____ Male or Female _____
Phone _____

2. _____
Child's Name

Address
_____ Age: _____ Male or Female _____
Phone _____

3. _____
Child's Name _____

Address _____
_____ Age: _____ Male or Female _____
Phone _____

4. _____
Child's Name _____

Address _____
_____ Age: _____ Male or Female _____
Phone _____

Who do you want to name as the Personal Representative(s) of your estate?

1. _____ Relation: _____ State of Residence _____
Name _____
2. _____ Relation: _____ State of Residence _____
Name _____
3. _____ Relation: _____ State of Residence _____
Name _____

Who do you want to name as the guardian(s) of your minor children or disabled adult? (if you have children under age 18) (Two persons may serve together as long as they are married.)

1. _____ Relation: _____ State of Residence _____
Name _____
2. _____ Relation: _____ State of Residence _____
Name _____
3. _____ Relation: _____ State of Residence _____
Name _____

Are any Beneficiaries on government benefits?

_____ SSI	_____ SSD	_____	_____
		Name	Relationship
_____ SSI	_____ SSD	_____	_____
		Name	Relationship

We recommend you keep all of your original legal documents in a Safe Deposit Box.

Where is your Safe Deposit Box? _____

If no Safe Deposit Box, where will you keep your originals?

LIST ASSETS: Approximate Value of Gross Estate:

Assets	Full Value	(Less Debt)	Net Value	Comments
Life Insurance				
Retirement plans				
Residence				
Other real estate: Property #1				
Property #2				
Property #3				
Checking				
Savings				
CDs				
Brokerage Account #1				
Account #2				
Account #3				
Notes (loans to others)				
Businesses Business #1				
Business #2				
Business #3				
Vehicles				
Personal effects				
Potential inheritance				
Total				
NET ASSETS				

Additional comments:
