

KENDRICKS BORDEAU

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CONFIDENTIAL ESTATE PLANNING INTAKE

During our meeting we will review the information below. Please complete the sections you can and give some thought to those that are difficult. Feel free to write on the back of this document. Also, please provide copies of any existing estate planning documents you have. Thank you!

<u>PERSONAL INFORMATION</u>			
Spouse #1 Full Name			
Spouse #1 Birth Date		Spouse #1 SSN	
U.S. Citizen?	☐ Yes ☐ No	Job Title:	
Spouse #2 Full Name			
Spouse #2 Birth Date		Spouse #2 SSN	
U.S. Citizen?	☐ Yes ☐ No	Job Title:	
Home Address			
Emails	<i>Self:</i>	Phone	<i>Self:</i>
	<i>Spouse:</i>	Numbers	<i>Spouse:</i>
Prior Marriage(s)?	☐ Yes ☐ No	Prior Marriage(s) Terminated by:	☐ Death ☐ Divorce <i>If divorce, any ongoing life insurance obligations? ☐ Yes ☐ No</i> <i>If yes, please provide copy of order.</i>
Pre/Postnuptial Agreement?	☐ Yes ☐ No <i>If yes, please provide copy of agreement.</i>		
Children	Child 1	Child 2	Child 3
Full Name			
Birth Date			
Address			
Married? <i>(Spouse name)</i>	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Grandchildren? <i>(Names, Ages)</i>			

<u>ASSETS</u>				
OWNED BY:	SPOUSE #1	SPOUSE #2	JOINT W/ SPOUSE	JOINT W/ OTHERS
Real Estate:				
<i>Please provide estimated value without reduction for mortgage or other debt.</i>				
Residence				
Vacation				
Other				
Any real estate with environmental contamination?	☐ Yes ☐ No			
Securities:				
<i>Held outside of retirement accounts</i>				
Stocks & Bonds				
Mutual Funds				
Cash:				
Checking Accounts				
Savings Accounts				
CDs				
Business Interests:				
<i>Please attach documents that control your interests (Shareholder/Buy-Sell/Operating Agreement, Bylaws, etc.).</i>				
<i>List percentage interests held by you and others, and note whether the entity is taxed as an S-Corp.</i>				
Closely Held Corporations				
LLCs				
Partnerships				
DBAs/ Sole Proprietorships				
Money Owed to You by Others:				
Promissory Notes (Unsecured)				
Mortgage(s)				
Land Contract(s)				

OWNED BY:	SPOUSE #1	SPOUSE #2	JOINT W/ SPOUSE	JOINT W/ OTHERS
Life Insurance/Annuities:				
<i>Please list all policies owned by you or another, list face value less loans. If you don't know, bring the policy.</i>				
Whole Life <i>On whose life?</i>				
Beneficiary(ies)?				
Term Life <i>On whose life?</i>				
Beneficiary(ies)?				
Accidental Death/Other <i>On whose life?</i>				
Beneficiary(ies)?				
Annuities <i>On whose life?</i>				
Beneficiary(ies)?				
Retirement Plans/Other Benefits:				
<i>Please list named beneficiaries if any.</i>				
IRA – Traditional				
IRA – Roth				
401(k)				
Pension and/or Profit-Sharing Plan				
Corp. Stock Options <i>Net Value?</i>				
Other Assets:				
Special Personal Items (<i>jewelry, art</i>)				
Firearms <i>Any regulated by National Firearms Act/ Title II?</i>				
Vehicles				
Boats, RVs, ATVs, Snowmobiles				

OWNED BY:	SPOUSE #1	SPOUSE #2	JOINT W/ SPOUSE	JOINT W/ OTHERS
Pre-Paid Funeral Contract <i>Value, Location?</i>				
Expected Inheritance <i>From whom?</i>				
Current Interest in Trust of Another <i>Whose?</i>				
<u>DEBTS</u>				
Mortgages Balance(s)	()	()	()	()
Land Contract Balance(s)	()	()	()	()
Promissory Notes	()	()	()	()
Other Debts	()	()	()	()
<u>TOTALS</u>				
TOTAL ASSETS <i>Add up all above.</i>	\$	\$	\$	\$
TOTAL DEBTS <i>Add up all above.</i>	()	()	()	()
NET	\$	\$	\$	\$

<u>MISCELLANEOUS</u>				
Any pending or threatened lawsuits?				
Do you have a professional license (M.D., D.D.S., etc.)? <i>Amount of prof. liability insurance?</i>				
Any cyber-assets? (Online accounts, blogs, currency) Interested in planning for them?				

QUESTIONS FOR CONSIDERATION BEFORE OUR MEETING

Finance and Medical Decisions During Life:

If you are living but need another to deal with finances/property for you, who should do it? Please include addresses, phone numbers, and your relationship to the person listed. *Or select a bank trust department or trust company.*

- 1.
- 2.

If you are living but unable to make medical decisions for yourself, who should do it? Please include addresses, phone numbers, and your relationship to the person listed.

- 1.
- 2.

Decisions at Death:

Do you want to donate your organs for transplant? ☐ Yes ☐ No And/or for study? ☐ Yes ☐ No

Which individuals would plan and carry out your funeral (your Funeral Representative)?

- 1.
- 2.

Do you want to be cremated? ☐ Yes ☐ No Any other wishes your Funeral Representative should know?

If any of your children is under age 18 at your death, please list the names and addresses of two *individuals* (even if part of a married couple) you would choose as the guardian for those children should the need arise.

- 1.
- 2.

When you die, who do you want to be in charge of managing and distributing your assets? Please include addresses, phone numbers, and your relationship to the person listed. *Or select a bank trust department or trust company.*

- 1.
- 2.

At your death, how and to whom do you want your assets distributed?

If all of the people you listed above die before you, how should your assets be distributed?

Do you want any restrictions placed on any of your distributions (e.g., minimum age for beneficiaries)?