

CONFIDENTIAL
ESTATE PLANNING WORKSHEET

FOSTER LAW GROUP
A PROFESSIONAL LIMITED LIABILITY COMPANY

Bainbridge Island Office
355 Ericksen Avenue NE, Suite 401
Bainbridge Island, WA 98110

Law Offices
www.fosterlawgroup.com
Phone/Fax: (206) 780-0440

Seattle Office
411 University Street, Suite 1200
Seattle, WA 98101

**CONFIDENTIAL
ESTATE PLANNING WORKSHEET**

Personal Information

Full name:	_____
Birthdate:	_____
Citizenship:	_____
Social security number:	_____
Home address:	_____ _____
Home telephone:	_____
Cell phone:	_____
E mail address:	_____
Employer:	_____
Office address:	_____ _____
Office telephone:	_____
Name of prior spouse (if any):	_____
Dependents other than children:	_____

Children

Name	Child only of H/W	Birthdate	Citizenship	Residence	Married? Y/N	No. of Children

General Information

Have you ever executed a community property agreement or agreement as to the status of property?

Estimated size of any potential Inheritance (from others):

Are you a Trustee or beneficiary of any trust, or do you possess any power or beneficial interest in a trust?

Do you have any power of appointment exercisable during life or at death, or have you previously exercised or released any power of appointment?

Have you ever filed a gift tax return?

Do you own insurance on the life of any person other than yourself?

Do you own property outside the State of Washington?

If so, where and what kind:

Are you Custodian of a UTMA or UGMA for the benefit of a minor?

Advisors (Name, address and telephone number)

Investments:	
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Accountant:	
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Insurance:	
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Other:	
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BENEFICIARY DESIGNATION ASSETS

Life Insurance

Number of policies:	
Owner:	
Insured:	
Permanent or Term?	
Death benefit:	
Cash Value (if any):	
Primary beneficiary(ies):	
Contingent beneficiary(ies):	

Retirement Benefits

Qualified Plans:

Type (401(k), 403(b), SEP, SIMPLE.):	
Approximate balance(s):	
Primary beneficiary(ies):	
Contingent beneficiary(ies):	

Non Qualified Plans (e.g., IRA, ROTH):

Approximately balance(s):	
Primary beneficiary(ies):	
Contingent beneficiary(ies):	

Defined Benefit Plans (pension):

Monthly payout:	
Beneficiary(ies) (if any):	

Last Will and Testament

A. Fiduciaries (Personal Representative, Trustee and Guardian):

1. **Personal Representative:** The Personal Representative is the individual(s) or entity (i.e. bank) designated to identify and collect assets of your estate, pay claims, expenses and obligations of the estate, settle the tax liability and distribute the estate as provided in your Will.

Name of individual(s) or entity to serve as Personal Representative	(PR)	
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(PR) and as Successor Personal Representative (SPR)	(SPR)	
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2. **Trustee:** The Trustee is the individual(s) or entity designated to hold, manage and distribute assets placed in any trust(s) established in your Will. The Trustee is guided by state law, and may obtain and rely on the advice of professionals regarding the management of the assets. The selection here often parallels the selection of PR(s) and SPR(s), discussed above.

Name of individual(s) or entity to serve as Trustee (TR),	(TR)	
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Successor Trustee (STR) of any trusts to be established and	(STR)	
Children's Trust Trustee (if any)		

3. **Guardian:** The Guardian of the person is the individual(s) who will take custody of your minor children (i.e. children under age 18) when there is no surviving parent. The Guardian's role is parental in nature, rather than financial. The Guardian and Trustee will coordinate with each other and can be the same person. You should name a successor guardian in the event the first named guardian is unable or unwilling to serve. You should also discuss this decision with the persons you choose prior to naming them in your Will.

Name of individual(s) to serve as Guardian (G) or Successor	(G)	
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Guardian (SG)	(SG)	
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B. Dispositive Provisions

1. It is usually advisable to establish a trust in your Will to hold your estate for the benefit of your young children. The provisions of the trust generally allow the Trustee to make payments for the health, support, maintenance and education of the children. At some point, however, a child's share is usually distributed to him or her outright, and the trust terminates. The termination should be at the age or ages at which the child can be expected to manage the funds independently. For example, one-half of a child's share could be distributed to the child at age 25 with the balance distributed at age 30. If you think that the use of a trust for the children is advisable, at what age or ages should their shares be distributed to them free of trust?

2. Do you wish to include in your Will gifts to individuals or entities (i.e., charities) other than your descendants (i.e., children, grandchildren)? _____. If yes, please list the persons and/or organizations and the amount(s) of specific bequests to each:

3. If none of your descendants survive until the complete distribution of your estate, please name the individuals, or perhaps charitable organizations, for whom you would like to provide in such circumstance:

4. **Special Concerns:**

Are there additional concerns or beneficiaries that haven't been discussed above?

5. **Existing Documents**

Please provide us with copies of any existing estate planning documents, including Last Wills and Testaments, Trust Agreements, Buy/Sell Agreements, Gift Tax Returns, Powers of Attorney, Living Wills, Divorce Decrees and Property Settlement Agreements, etc.

OTHER DOCUMENTS

A. General Durable Power of Attorney

The General Durable Power of Attorney allows you to appoint an individual(s) (i.e. "the attorney-in-fact") to make decisions and take actions regarding your property in the event you are incapacitated. The General Durable Power of Attorney is designed to preclude the need for a guardianship proceeding in the event of incapacity and becomes effective immediately or upon your disability or incompetence, as you determine appropriate.

Name of individual to serve as attorney-in-fact (AIF) and		
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and successor attorney in fact (SAIF)		
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B. Medical Power of Attorney

The Medical Power of Attorney allows the attorney-in-fact to make decisions regarding the medical treatment and non-treatment of the principal. It is effectively immediately.

Name of individual to serve as attorney-in-fact(AIF) and		
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successor attorney in fact (SAIF)		
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C. Health Care Directive

We recommend that you complete a Health Care Directive to assist in decision making. We will discuss your options.

Existing Documents

Please provide us with copies of any existing estate planning documents, including Last Wills and Testaments, Community Property Agreements, Pre and Post Nuptial Agreements, Trust Agreements, Buy/Sell Agreements, Gift Tax Returns, Powers of Attorney, Living Wills, Divorce Decrees and Property Settlement Agreements, etc.

ASSETS AND LIABILITIES

I. U.S.-SITUS ASSETS

Cash (checking and savings accounts):	
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Short-term investments - treasury bills, certificates of deposit, etc.:	
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Publicly traded securities and bonds:	
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Annuities:	
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Closely held securities (e.g., S CORP stock)*:	
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Principal Residence:	
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Vacation Home:	
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Other real estate:	
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Partnerships (and LLC's)*:	
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Accounts receivable:	
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Life Insurance Death Benefit:	
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Retirement benefits (summary of details from earlier page):

Qualified plans:	
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Non qualified plans:	
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Furnishings (including art work and antiques):	
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Automobiles:	
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Boats:	
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Other:	
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I. TOTAL U.S. SITUS ASSETS	
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* If controlling interest is owned in closely held corporation or partnership, give details.

II. U.S.-SITUS LIABILITIES

Mortgage(s):	
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Guarantee:	
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Loans, notes, etc.:	
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Other Obligations:	
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II. TOTAL U.S. SITUS LIABILITIES	
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U.S. SITUS NET WORTH (ASSETS MINUS LIABILITIES)	US\$
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COMPLETE THE FOLLOWING TWO PAGES ONLY IF YOU OWN ASSETS LOCATED OUTSIDE OF UNITED STATES

III. FOREIGN.-SITUS ASSETS (In U.S. Dollars; indicate situs country)

	Situs	Dollar Value
Cash (bank accounts):		\$
Short-term investments:		\$
Securities and bonds:		\$
Annuities:		\$
Closely held securities:		\$
Principal Residence:		\$
Vacation Home:		\$
Other real estate:		\$
Partnerships:		\$
Accounts receivable:		\$
Life Insurance Death Benefit:		\$
Retirement benefits (Indicate type)		\$
Furnishings:		\$
Automobiles:		\$
Boats:		\$
Other:		\$

III. TOTAL FOREIGN.-SITUS ASSETS US\$ _____

IV. FOREIGN-SITUS LIABILITIES (In U.S. Dollars; indicate situs country)

	Situs	Dollar Value
Mortgage(s):		\$
Guarantee		\$
Loans, notes, etc.:		\$
Other Obligations:		\$

FOREIGN-SITUS NET WORTH (III-IV)

US\$ _____