

CARNEY DYE, LLC

Estate Planning Worksheet

PERSONAL INFORMATION

Name (full legal name): _____

Street Address: _____

City: _____ State: _____ Zip Code: _____ County: _____

Home Phone: (____) _____ Cell Phone: (____) _____ Work Phone: (____) _____

Email Address: _____

Date of Birth: _____ U.S. Citizen: Yes No

Occupation and Employer: _____

Marital Status: Single Married Previously Married: Yes No

Do you have a religious preference? _____

FAMILY INFORMATION

If you are currently married, please complete the following information regarding your Spouse:

Date of Marriage: _____ Place of Marriage: _____

Spouse (full legal name): _____

Cell Phone: (____) _____ Work Phone: (____) _____

Email Address: _____

Date of Birth: _____ U.S. Citizen: Yes No

Occupation and Employer: _____

Previously married? Yes No

If you and/or your spouse have any children, please complete the following section regarding the children:

Name	Date of Birth

Are any of these children from a previous relationship? Yes No

MISCELLANEOUS INFORMATION

Who is your Accountant? _____

Who is your Life Insurance Agent? _____

Who is your Stockbroker or Financial Planner? _____

QUESTIONS TO CONSIDER BEFORE MEETING

1. What do you want to ensure we address in your estate planning documents?

2. What concerns you the most?

3. Do you have any specific burial wishes?

4. Are there any specific items of personal property (jewelry, furniture, art, cars, etc.) that you would like to direct to particular people?

5. Are there any charitable gifts you would like to make? If so, please list.

6. Do you own any out of state property (if yes, please indicate property type and state of property)?

7. Do you own an interest in a closely held business?

8. Do you or any members of your family require special schooling, medical attention, full-time nursing care at home or other special attention? If so, please explain:

9. Are there any other concerns or questions you have that are not addressed on this sheet?

DOCUMENTS TO BRING TO YOUR PLANNING MEETING
(if available/applicable)

- Current Estate Planning Documents
- Property Deeds
- Any Trusts of which you are a beneficiary
- Any Prenuptial Agreement(s)
- Any Divorce Decree(s)

FIDUCIARY APPOINTMENTS

Below are fiduciary appointments you will make in your estate planning documents. If you know who you would like to serve in these roles at this time, please list the individual's or company's full, legal name. If you do not know, feel free to leave them blank for now. You can name joint fiduciaries in any of these roles.

General Durable Power of Attorney

1. Who should make business and financial decisions if you cannot make them for yourselves:

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

Advance Directive for Health Care

1. Who do you want making health care decisions for you?

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

Will

1. Who should be named as the Executor (Personal Representative) of your estate? Please name at least one successor Executor.

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

If you have children please complete question 2.

2. If you (and your spouse if applicable) were no longer living, who should have custody of your minor or disabled children? You may name an individual or a couple to serve together. Please also name at least one successor guardian.

First Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

Second Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

Third Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

3. If you choose to set up a trust for your beneficiaries, who should manage the property until the beneficiaries are entitled to receive it? Please also name at least one successor Trustee.

First Choice: _____

Second Choice: _____

Third Choice: _____