

## BASIC ESTATE PLANNING FACT SHEET

### RELEVANT FAMILY MEMBERS

	Full Legal Name	Age	Address & Phone No.
Wife:			
Husband:			
Child 1:			
Child 2:			
Child 3:			
Child 4:			
Other 1:			
Other 2:			

## BALANCE SHEET

	<b>Basic Description</b>	<b>Approximate Value</b>
Real Estate		
Cash/Securities		
Personal Effects		
IRAs/Qualified Retirement Plans (include Owner & Beneficiary)		
Life Insurance (include Owner & Beneficiary)		
Other Assets (i.e. Business Interests)		
Liabilities		

## APPOINTMENTS

*Executor of Will and Estate (handles the affairs of the estate, including filing tax returns, paying debts, managing assets and ultimately distributing probate assets to the estate beneficiaries)*

	<b>Name &amp; Relation</b>	<b>Address &amp; Phone No.</b>
Initial Executor		
Alternate Executor		
2nd Alternate Executor		

*Guardian (if minor children)*

	<b>Name &amp; Relation</b>	<b>Address &amp; Phone No.</b>
Initial Guardian		
Alternate Guardian		

*Trustee of Trusts (if trusts are to be created under Will) (handles the affairs of the trust, manages the trust assets, files the trust tax returns, and makes trust distribution decisions)*

	<b>Name &amp; Relation</b>	<b>Address &amp; Phone No.</b>
Initial Trustee		
Alternate Trustee		
2nd Alternate Trustee		

# FIZERBECK

## APPOINTMENTS (continued)

*General Power of Attorney (designates an agent to make business and financial decisions for you)*

	Name & Relation	Address & Phone No.
Initial Agent for Wife		
Initial Agent for Husband		
First Alternate Agent for Wife		
First Alternate Agent for Husband		
2nd Alternate Agent for Wife		
2nd Alternate Agent for Husband		

*Medical Power of Attorney (designates an agent to make health care decisions for you)*

	Name & Relation	Address & Phone No.
Initial Agent for Wife		
Initial Agent for Husband		
First Alternate Agent for Wife		
First Alternate Agent for Husband		
2nd Alternate Agent for Wife		
2nd Alternate Agent for Husband		

*Beneficiaries of your estate (if your spouse and your children fail to survive you)*

	Name & Relation	Address & Phone No.
Wife		
Husband		