

# GIORDANO, HALLERAN & CIESLA

A PROFESSIONAL CORPORATION  
ATTORNEYS AT LAW

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## CONFIDENTIAL ESTATE PLANNING WORKSHEET

Requested Attorney: ☐ Timothy J. Dengler, Esq. ☐ Robert J. Gaughran, Esq. ☐ Adam C. Solan, Esq. ☐ Unsure

Date of Worksheet: \_\_\_\_\_

Client 1

Client 2

1. Full legal name

\_\_\_\_\_

\_\_\_\_\_

2. Home address

\_\_\_\_\_

\_\_\_\_\_

3. Home telephone #

\_\_\_\_\_

\_\_\_\_\_

4. Cell phone #

\_\_\_\_\_

\_\_\_\_\_

5. Email address

\_\_\_\_\_

\_\_\_\_\_

6. Employer name

\_\_\_\_\_

\_\_\_\_\_

7. Employer address

\_\_\_\_\_

\_\_\_\_\_

8. Employer telephone

\_\_\_\_\_

\_\_\_\_\_

9. Date of birth

\_\_\_\_\_

\_\_\_\_\_

10. Citizenship

\_\_\_\_\_

\_\_\_\_\_

11. State of Residence

\_\_\_\_\_

\_\_\_\_\_

12. Social Security Number

\_\_\_\_\_

\_\_\_\_\_

13. Date/Place of Marriage

\_\_\_\_\_

\_\_\_\_\_

14. Pre- or post-nuptial  
agreements  
(yes / no) attach copy

\_\_\_\_\_

\_\_\_\_\_

15. Prior marriages:

\_\_\_\_\_

\_\_\_\_\_

Former spouse name

\_\_\_\_\_

\_\_\_\_\_

Termination event/date

\_\_\_\_\_

\_\_\_\_\_

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## Child #1

Name \_\_\_\_\_

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Child's Occupation \_\_\_\_\_

Child's Spouse \_\_\_\_\_

Prior marriages \_\_\_\_\_

	Name	Age
Children	_____	_____
	_____	_____
	_____	_____

Special Concerns/Notes \_\_\_\_\_

## Child #2

Name \_\_\_\_\_

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Child's Occupation \_\_\_\_\_

Child's Spouse \_\_\_\_\_

Prior marriages \_\_\_\_\_

	Name	Age
Children	_____	_____
	_____	_____
	_____	_____

Special Concerns/Notes \_\_\_\_\_

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**Child #3**

Name

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Address

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Date of Birth

---

Child's Occupation

---

Child's Spouse

---

Prior marriages

---

Children

Name

Age

---

---

---

---

---

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Special Concerns/Notes

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**Child #4**

Name

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Address

---

Date of Birth

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Child's Occupation

---

Child's Spouse

---

Prior marriages

---

Children

Name

Age

---

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Special Concerns/Notes

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## Other Beneficiaries

Any other persons to be named in Will? List names, addresses and relationships:

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## 1. ANNUAL INCOME

Client 1

Client 2

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## 2. CURRENT ESTATE VALUE

### A. Real Estate

<u>Property Address</u>	<u>How Titled</u>	<u>Value</u>	<u>Mortgage</u>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>

### B. Cash/Savings/Money Market/CDs

<u>Name of Bank</u>	<u>How Titled</u>	<u>Value</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

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## C. Stocks/Bonds/Mutual Funds

<u>Description</u>	<u>How Titled</u>	<u>Value</u>	<u>Designated Beneficiaries</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## D. Profit Sharing / IRA's / 401Ks / Pension Plans

<u>Description</u>	<u>How Titled</u>	<u>Value</u>	<u>Designated Beneficiaries</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## E. Life Insurance

Insurance Co.	Policy No.	Insured	Beneficiaries	Face Value	Cash Value	Type

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## F. Safe Deposit Box

Location, how registered and who has access

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## G. Business Interests

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## H. Any other items of particular value

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## I. Personal debts other than your mortgage and loans listed above.

<u>Who do you owe?</u>	<u>Amount owed</u>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

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## J. Loans made to family members and others:

<u>To Whom and Relationship</u>	<u>Amount owed</u>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

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## 3. APPOINTEES

The following questions ask whom you would like to serve as Executor, Trustee and Guardian if necessary.

**A. Executor/Personal Representative** An Executor is the person or corporation named in your will to administer the settlement of your estate. This appointment involves significant responsibility and can be compensated as provided by the laws of the state where your estate is administered.

Please fill in the name and address of the individual/corporation you would like to serve as Executor:

1.

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If this individual/corporation predeceases you or fails to qualify, who would you like to serve in default?

2.

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**B. Trustee** The Trustee is the person/bank who would manage the assets held in trust when and if necessary. This appointment also involves significant responsibility and can be compensated by the laws of the state where the trust is held or by separate agreement.

Please fill in the name and address of the individual/corporation you would like to serve as Trustee:

1.

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If this individual/corporation predeceases you or fails to qualify, who would you like to serve in default?

2.

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**C. Guardian** A Guardian is the person who would raise your minor children in the event your spouse predeceases you.

Please fill in the name and address of the individual you would like to serve as Guardian.

1.

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If this individual predeceases you or fails to qualify, who would you like to serve in default?

2.

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## 4. LIVING WILLS

Executing a living will is a directive to your family and doctors to withhold artificial life support equipment or heroic measures if your medical condition is irreversible.

Who would you appoint as your agent to follow your directive? Who would you appoint as your successor agent?

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## 5. POWER OF ATTORNEY

Executing a power of attorney authorizes a person who you select to carry on with your financial affairs in the event that you should become unable to do so yourself.

Who do you want to appoint to be your attorney in fact? Who would you appoint as your successor agent?

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Would you like a clause where you could donate your organs/body parts to sustain or improve life? ☐ yes ☐ no

Would you like a clause where you could donate your body for medical research? ☐ yes ☐ no

Would you like to name a Funeral Agent/Representative to enforce your burial/cremation wishes? ☐ yes ☐ no

Would you like to be cremated after death? ☐ yes ☐ no

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## Contact Persons

Accountant:

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Financial Advisor:

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Insurance Agent:

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Misc. Contacts

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## Gift/Estate Questions

Have any taxable gifts been made? Have gift tax returns ever been filed?

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Are any inheritances/major gifts likely to be received in the near future?

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List the names and types of trusts for which either client is currently a beneficiary, trustee or grantor.

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Do you have an existing will?

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