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**ESTATE PLANNING INFORMATION SHEET**

*(Note that this document is being used to gather preliminary information only. Your responses to these items as well as any other questions or concerns you may have will be discussed more fully during our preliminary meeting as well as before any drafting is started on your Estate Planning Documents. **This information will remain confidential.**)*

1. Full Legal Name (husband and wife):

2. Legal Residence and Telephone Number:

3. Other Background Information:

i. United States Citizen:

ii. Prior Marriage:

4. Beneficiaries (full names and ages):

i.

ii.

iii.

iv.

5. Specific Bequest(s), if any:

i.

ii.

6. What types of Estate Planning documents interest you? Please check any document, which may interest or apply to you.

Last Will and Testament \_\_\_\_\_

Revocable/Family/Living Trust \_\_\_\_\_

Advance Directive for Health Care \_\_\_\_\_

Power of Attorney \_\_\_\_\_

Other: \_\_\_\_\_  
\_\_\_\_\_

7. Do you have any minor children? If so, please consider who should raise your children in the event that both spouses should die before the children reach the age of 18 years.

8. Please consider who you wish to handle your affairs in the event of your death or incapacity. Please include addresses and telephone numbers.

9. Describe your basic plan for the distribution of your Estate. Please include the names and the percentage share of property to each individual or institution.

10. Describe any additional instructions you may have regarding your Estate Planning:

Burial/Cremation \_\_\_\_\_ Children with Special Needs \_\_\_\_\_

Organ Donation \_\_\_\_\_ Transfers to Charity(ies) \_\_\_\_\_

Trust for Minors \_\_\_\_\_ Other \_\_\_\_\_

11. Because Federal and Maryland Estate Taxes may be a major concern in Estate Planning, please provide an estimate of your financial net worth:

a) Assets

- i. Real Estate:
  
- ii. IRA's/Retirement Plans:
  
- iii. Life Insurance (Term/Whole/Universal):
  
- iv. Bank Accounts:
  
- v. Stocks:
  
- vi. Bonds:
  
- vii. Personal Effects

Total\_\_\_\_\_

b) Long-term Liabilities

- i. Mortgage:
  
- ii. Other Long-term Debts:

Total\_\_\_\_\_

JULIE A. SCHEJBAL is a member of the Maryland Bar and the United States Tax Court Bar. Her practice concentrates in the areas of estate planning, retirement planning, estate administration, business planning, and taxation. Prior to entering private practice, she worked as an attorney for the Internal Revenue Service in the estate and gift tax division. She is an adjunct business professor at the University of Phoenix, Columbia, Maryland Campus. She is a graduate of the University of Maryland, College Park (*cum laude*) and of Duke University School of Law. Co-Author: "The State of Small Business Retirement Plans: 25 Years After ERISA", NYU, Institute on Federal Taxation, Employee Benefits and Executive Compensation, 1999".