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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: Yes_____ No_____

   ii. Prior Marriage: Yes_____ No_____

   iii. Other:

4. Beneficiaries (full names, ages, and relationship to you):
    i.
    ii.
    iii.
    iv.
    v.
    vi.

5. Specific Bequest(s), if any:
    i.
    ii.
    iii.

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 for one primary person and at least one back-up personal representative.

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	______	Provisions for Pets	____________
Other	____		

11. Because Federal 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. 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 adjutant business professor at the University of Phoenix, Columbia, Maryland Campus. She is a graduate of the University of Maryland, College Park (*cum laude*) (1986) and of Duke University School of Law (1990). Co-Author: "The State of Small Business Retirement Plans: 25 Years After ERISA", NYU, Institute on Federal Taxation, Employee Benefits and Executive Compensation, 1999". Member, Trial Courts Judicial Nominating Commission for Commission District 12 (Southern Maryland). Member, Board of Directors, and Legal Counsel Brem Foundation to Defeat Breast Cancer, Inc.