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Steven P. Carlson
Estate Planning
Interview Form

Please fill out the form below before the interview.

Date: _____

A. Personal Information:

Husband's name: _____ Date of birth: _____

Social Security No.: _____

Wife's name: _____ Date of birth: _____

Social Security No.: _____

Address: _____

Home Telephone: _____ Other Contact No.: _____

Children: Please list ALL of your children, including deceased children, children born out of wedlock, and children you wish to omit from your estate plan.

<u>Name of Child</u>	<u>Date of Birth</u>	<u>Address</u>	<u>Child of</u>
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Identify any child(ren) who is not a natural or legally adopted child(ren) of both you and your spouse.

B. Status:

	Yes	No
Do you now have a will?		
Do you now have a trust?		
Do you have a pre-nuptial agreement?		
Have you been divorced?		
Has any child pre-deceased you?		
Does any child owe you money?		
Is any child under a disability?		
Have you guaranteed any loans for a child?		
Do you expect any future inheritance?		
Do you have a bank box?		
Do you want your personal property to go to each other, then to children equally and grandchildren of any deceased child?		

Personal Representative: Who should be Personal Representative (Aexecutor@) of your estate? A Personal Representative, such as a spouse, is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

Name: _____

Relationship to you: _____

Address: _____

Alternate Personal Representative: _____

Relationship to you: _____

Address: _____

Guardians: Who should be a guardian of your minor children? (A guardian has physical and legal control over your children until they reach the age of 18.)

Name: _____

Address: _____

Trusts: If a trust is appropriate to include your estate plan, who should be the trustee? A trustee is the person or entity who is responsible for managing the assets placed into the trust. A trustee manages the assets for your children or other beneficiaries until they reach specified ages. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your trustees.

Name: _____

Address: _____

Alternate Trustee: _____

Address: _____

Street Address: _____

City, State and ZIP: _____

C. Matters you wish to discuss:

	Yes	No		Yes	No
Will			Health Care Directive		
Living trust to avoid probate			Durable Power of Attorney		
Life estate to protect property			Nursing home issues		

D. Distribution:

1. Standard Will/Trust Clauses (if no, revise standard form):

- | Clause: | Yes | No |
|--|-------|-------|
| a. Items of sentimental value? | _____ | _____ |
| b. Funeral, debts and taxes clause? | _____ | _____ |
| c. Residue to spouse, then children, per stirpes?
If no, specify: | _____ | _____ |
| d. Waive Bond | _____ | _____ |
| e. Expense to be paid out of general estate
and not residue clause? | _____ | _____ |

2. Special Will Clauses (if any, revise standard form)

- | | Yes | No |
|--|-------|-------|
| a. If account in J/T with just child, intend
that it go to all children equally | _____ | _____ |
| b. Specific devises? | _____ | _____ |
| c. Special instructions? | _____ | _____ |

- | | | |
|--|-----|-----|
| 3. Contingent Testamentary Trust: | Yes | No |
| a. Approximate net worth (including insurance face value): | | |
| If over \$1,000,000 trust necessary to avoid federal estate tax? | ___ | ___ |
| If over \$1,000,000 trust necessary to avoid state estate tax? | ___ | ___ |
| Or over \$700,000 to avoid state estate tax? | ___ | ___ |
| b. Trust to delay age of when children receive property? | ___ | ___ |
| Division Date: | | |
| _____oldest age 25 _____ other age | | |
| _____youngest child reaches 18 _____ other age | | |
| Distribution Ages: | | |
| _____ 2 at 25 & 30 or other ages: _____ | | |

E. Probate Avoidance:

Homestead in J/T? ___ Yes ___ No Bank accounts in J/T? ___ Yes ___ No
 _____ Transfer to J/T _____ to children reserving life estate _____ to trust

F. Health Care Directive:

1. _____ Husband _____ Wife _____ Principal
2. Name of Principal: _____
 Name of Spouse: _____
3. Proxy: _____
 Street Address: _____
 City, State and ZIP: _____
 Phone: _____
 Relationship: _____
4. Alternate Proxy: _____
 Street Address: _____
 City, State and ZIP: _____
 Phone: _____
 Relationship: _____
5. Special Clauses: _____

G. Durable Power of Attorney:

1. Name of principal: _____
 Name of spouse: _____
 Street Address of principal/spouse: _____
 City, State and ZIP: _____

1. Power of attorney: _____
Street Address: _____
City, State and ZIP: _____

2. Alternate Power of attorney: _____
Street Address: _____
City, State and ZIP: _____

3. Default Clauses.

Joint? _____ yes _____ no

All powers? _____ yes _____ no

Durable? _____ yes _____ no

Property to holder of power? _____ yes _____ no

H. Administrative:

Fee estimate \$ _____ Next appt.: _____