



**JILL GREGORY | YOUR  
ATTORNEY FOR LIFE**

# ESTATE PLANNING WORKSHEET

[www.jillgregorylaw.com](http://www.jillgregorylaw.com)

Peace of mind knowing that  
you, your children, your loved ones, & your legacy  
will be taken care of in the best way possible.

# PERSONAL INFORMATION

Name

---

Also Known As

---

Prefer to be called

---

Birth date \_\_\_\_\_ US Citizen? \_\_\_\_\_

Phone Numbers (mobile/home)

---

E-mail Address (It is okay to communicate with me via E-mail )

---

Address

---

---

Mailing Address (if different)

---

---

Name of Spouse/Partner/Significant Other

---

Also Known As

---

Prefer to be called

---

Birth date \_\_\_\_\_ US Citizen? \_\_\_\_\_

Phone Numbers (mobile/home)

---

E-mail Address (It is okay to communicate with me via E-mail )

---

- Married
- Divorced
- Legally Separated
- Life Partner / Significant Other

# CHILDREN

Name(s)

Birth date

---

---

---

---

---

---

---

---

---

---

Number of grandchildren: \_\_\_\_\_

Is there anything you would like us to know about your children or grandchildren?

---

---

# YOUR PLANNING OBJECTIVES

Please identify the reasons you are considering planning or areas you would like to learn more about (select as many as you wish):

## Preserve and Maximize Assets

- By minimizing taxes during your life (income taxes, capital gains taxes, estate taxes on inheritances you expect to receive)
- By minimizing or eliminating estate taxes upon your death (up to 55% of your assets and life insurance benefits)
- By reducing estate administration costs through probate avoidance
- Ensure that a special needs beneficiary has assets that are protected from government seizure while retaining eligibility for needed services
- Ensure that your family has enough life insurance to provide a comfortable lifestyle no matter what
- By ensuring that your assets are passed to your descendants and not given away to outsiders, such as spouses, creditors or the government

## Protect Yourself and Your Spouse/Partner

- From malpractice or other creditor claims
- From conservatorship proceedings (aka "living probate") if you or your spouse/partner become incapacitated
- From probate delays and stress upon your death or the death of your spouse/partner
- From hospital policies requiring life sustaining procedures when you would rather not endure them
- From healthcare decisions made by people other than those you trust most

## Protect Your Children or other Beneficiaries

- \_\_\_ From predators who can discover inheritance amounts and target young or vulnerable beneficiaries
- \_\_\_ From claims of divorced spouses to take half of your child or beneficiary's inheritance
- \_\_\_ From malpractice claims, for beneficiaries in the professions
- \_\_\_ From other creditors' claims (such as car accident plaintiffs)
- \_\_\_ From the stress and delays of the average 16-month process of probate
- \_\_\_ From the financial immaturity resulting in a quick loss of an inheritance
- \_\_\_ From sharing assets with heirs you would rather disinherit
- \_\_\_ From litigation claims by disinherited heirs
- \_\_\_ For parents with young children only: from relatives who would be poor, abusive or even dangerous guardians or foster care
- \_\_\_ For parents with young children only: from acquaintances/relatives who should not be allowed to be alone with your child

## Your Goals and Desires

- \_\_\_ Get your financial life organized
- \_\_\_ Have clarity about your life purpose, goals and dreams
- \_\_\_ Benefit a charitable organization or activity
- \_\_\_ Support a common family goal through coordinated planning
- \_\_\_ Have a plan to leave the world a better place

- \_\_\_\_\_ By specifying the values, insights, stories and experiences you want passed on to your children and how you want the money you leave behind used for your children
  
- \_\_\_\_\_ For special needs beneficiaries only: By providing instructions, people, and assets to support your special needs beneficiaries above a poverty lifestyle
  
- \_\_\_\_\_ For business owners only: By providing for the orderly continuation and transfer of family business interests rather than a distress sale

## IMPORTANT FAMILY QUESTIONS

	CLIENT	SPOUSE / PARTNER
Do you have a will, trust, or other estate planning document? <i>Please furnish copies of these documents</i>		
Are you making payments pursuant to a divorce or property settlement order?		
If married have you and your spouse signed a pre- or post-marriage contract? <i>Please furnish a copy</i>		
Do you or any of your children or other beneficiaries have disabilities, serious health problems or other special needs?		
Do you own a business?		
Do you own a long-term care (nursing home) insurance policy?		
Do you own any property that is not community property?		
Have you (or your spouse) ever filed federal or state gift tax returns?		
Do you support any charitable organizations now that you wish to make provisions for at the time of your death?		
Are you currently the beneficiary of anyone else's trust?		



## BASIC ASSET INFORMATION

This information will help us provide you with specific information regarding possible estate taxes and probate fees.

Do you own your home or other real estate? \_\_\_\_\_

List Property Address(es)

---

---

---

Approximate Value of Bank and Savings Accounts

---

Approximate Value of Securities, Stocks and Bonds

---

Approximate Value of Retirement Accounts

---

Approximate Value of Life Insurance

---

Do you own a business or businesses? \_\_\_\_\_ Please describe below

---

---

Other Assets

---

Any additional information you would like to share with us

---

---

---

---

---

---

---

---

---

---

I look forward to learning how we can serve you and your family.

Warmly,

Jill Gregory