



SEASONS LAW P.C.

An estate planning law firm for life's seasons.

Attorneys Lynn A. Dean & Tracy Poston Shows

Will and Trust Information Checklist

Husband Name: _____ **Date:** _____

Wife Name: _____

(How each spouse usually signs his/her name)

Children

Name	Age	Date of Birth (if under 18)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

TRUST

Name of Successor Trustee (to take over after husband and wife are no longer available)

Name of Alternate Successor Trustee

Distribution of assets

- Specific assets to particular persons?
- Remainder of assets, to children, and at what age do children control the remainder?
- If one or more of the children do not survive, does that child's share go to:
 - his/her children?
 - the other children?
 - to parents of husband and wife?
 - to siblings of husband and wife?
 - If no children survive, the estate goes to?

WILLS

- Name of Executor, and alternate: _____
- Name of Guardian for children, and alternate: _____

Some things to consider

- Any specific bequests
- Donations to charities
- Items to individuals

POWER OF ATTORNEY

- General - someone who will be able to sign your name on all legal documents (& alternate)
Name: _____
Alternate: _____
- Health - someone who can make your health care decisions for you (& alternate)
Name: _____
Alternate: _____
 - Do you want life support?
 - Do you want pain relief?
 - Do you want to donate useable organs?
 - Do you want burial or cremation?

ASSETS

Real Property: (Address, City, State, Zip)

Please Include Timeshares and all other Real Property other than residence.
If possible, bring copies of Deeds to the initial appointment.

1. _____
2. _____
3. _____
4. _____

Example: *1234 Anywhere Lane, Any Town, State, 12345*

Personal Property: (Such as Investment Accounts and Bank Accounts)

1. _____
2. _____
3. _____
4. _____

Example: *Fidelity Mutual Funds Account Number# FI-1234*