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Information Needed for Estate Planning

TRUST

Full name of each spouse

How each spouse usually signs his/her name

Full names of children, and birth dates for any under age 18

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

Name of Alternate 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?

List of assets

Copies of deeds for any real estate

WILLS

Any specific bequests

- donations to charities

- items to individuals

Name of Executor, and alternate

Name of Guardian for children, and alternate

POWER OF ATTORNEY

General - someone who will be able to sign your name on all legal documents (& alternate)

Health - someone who can make your health care decisions for you (& alternate)

Do you want life support?

Do you want pain relief?

Do you want to donate useable organs?

Do you want burial or cremation?