



8. Whom would you like to serve as your fiduciaries? A fiduciary may be an individual or a bank.
- a. The Executor will manage your estate. He or she should be a resident of your home state; however, out-of-state relatives (by blood or marriage) may serve.
    - 1.
    - 2.
    - 3.
  - b. The Trustee will manage your trust, if you decide to create one. The Trustee must invest and manage money, as well as maintain relationships with the beneficiaries and make decisions about distributions to the beneficiaries.
    - 1.
    - 2.
    - 3.
  - c. A Guardian is responsible for the physical well-being, the estate, or both, of an incompetent or minor. Parents of young children frequently want to name relatives or friends to serve as guardians of their children if both parents die.
    - 1.
    - 2.
    - 3.
  - d. Your Attorney-in-fact operates under either a “Durable Power of Attorney” that takes effect immediately, or under a “Springing Durable Power of Attorney” that only kicks-in if and when you become disabled. Please circle the option that works best for you. An Attorney-in-fact basically manages your money if you aren’t able to do so yourself.
    - 1.
    - 2.
    - 3.

## II. HEALTH CARE DOCUMENTS

### **OHIO RESIDENTS ONLY (Kentucky residents, skip over to the next page)**

#### **Health Care Power of Attorney**

As you might infer, a Health Care Power of Attorney is a document wherein you appoint someone to make health care decisions on your behalf in the event that you are not able to do so yourself. Most clients appoint their spouses to serve. The State of Ohio recommends that you select two alternates just in case your first appointee is not available.

1. Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City, State, ZIP \_\_\_\_\_
2. Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City, State, ZIP \_\_\_\_\_
3. Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

#### **Living Will Declaration**

In Ohio, a Living Will is a directive to your physicians in the event you are terminally ill or in a persistent vegetative state. You may also elect to allow the withholding of artificially supplied nutrition and hydration, which we will discuss at our next meeting. Your Health Care Power of Attorney must not act in a way that contravenes the wishes you express in this document. If you want your spouse or family to make all health care decisions, then you do not want to execute a living will. The State of Ohio requests that you list two contact persons to be notified if your Living Will Directive becomes operative. If your contact persons are going to be the first two persons you listed on your Health Care Powers of Attorney, just write "SAME" on the line. Otherwise, fill in the lines below.

1. Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City, State, ZIP \_\_\_\_\_
2. Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

**KENTUCKY RESIDENTS ONLY**

The Commonwealth of Kentucky has a form called “Living Will Directive and Health Care Surrogate Designation.” Kentucky’s living will allows you to make certain elections about medical treatment and the provision of artificial nutrition and hydration in the event you are terminally ill or in a persistent vegetative state. We will review those options at our next meeting. A Health Care Surrogate makes health care decisions on your behalf in the event that you are not able to do so yourself. Most clients appoint their spouses to serve as Health Care Surrogate. We recommend that you designate an alternate.

- 1. Name: \_\_\_\_\_ County of residence: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ County of residence: \_\_\_\_\_

**III. SHORT-AND-QUICK ASSET IDENTIFICATION**

You’ve already identified who you want to receive your property and when. Now it’s time to briefly examine your assets so we can determine the best estate planning methods for you.

**REAL PROPERTY:** Located in \_\_\_\_\_, State of \_\_\_\_\_

Is your primary residence owned in survivorship with your spouse? Do any other persons hold a legal right in the property? What is its fair market value?

Do you have any investment or vacation properties? Who owns them and where are they located?

**LIFE INSURANCE:** Company \_\_\_\_\_ Policy number \_\_\_\_\_

Owner \_\_\_\_\_ Beneficiary \_\_\_\_\_ Amount \_\_\_\_\_

**INVESTMENTS:** Identify the type of investment and estimate its value.

**RETIREMENT PLANS:** Identify the type, IRA, 401(k), etc., as well as its estimated value.

**IV. PERSONAL INFORMATION**

HUSBAND

WIFE

Full Name: \_\_\_\_\_

Home Address  
and Telephone Number: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

Business Address  
and Telephone Number: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Email Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Place of Birth  
(Citizenship): \_\_\_\_\_

Have you ever lived in  
any other state or foreign  
country? If so, where  
and when: \_\_\_\_\_  
\_\_\_\_\_

Social Security No.: \_\_\_\_\_

Do you have a Will? Yes \_\_\_\_\_ No \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have a Trust? Yes \_\_\_\_\_ No \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_

**V. MARRIAGE INFORMATION**

HUSBAND

WIFE

Date of Marriage: \_\_\_\_\_

Do you have financial obligations to a former spouse? \_\_\_\_\_

Do you have an antenuptial agreement? \_\_\_\_\_

**VI. FAMILY INFORMATION**

**CHILDREN**

1. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

2. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

3. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

4. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

5. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

6. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

7. \_\_\_\_\_  
NAME ADDRESS BIRTHDATE

GRANDCHILDREN

1.	NAME	ADDRESS	BIRTHDATE
2.	NAME	ADDRESS	BIRTHDATE
3.	NAME	ADDRESS	BIRTHDATE
4.	NAME	ADDRESS	BIRTHDATE
5.	NAME	ADDRESS	BIRTHDATE
6.	NAME	ADDRESS	BIRTHDATE
7.	NAME	ADDRESS	BIRTHDATE
8.	NAME	ADDRESS	BIRTHDATE
9.	NAME	ADDRESS	BIRTHDATE
10.	NAME	ADDRESS	BIRTHDATE

PERSONS OTHER THAN CHILDREN  
WHO ARE DEPENDENT UPON YOU FOR SUPPORT

1.	NAME	ADDRESS	BIRTHDATE
2.	NAME	ADDRESS	BIRTHDATE
3.	NAME	ADDRESS	BIRTHDATE