Initial Trust / Will Consultation Questions

1. Full name(s) and Date(s) of Birth for you and/or your spouse

2. When were you married and if this is your first marriage (if applicable)?
    a. If not your first marriage, I will need the name(s) of you previous spouse(s) and when that marriage(s) happened.
    b. Full names of any children born or adopted by you both, along with their dates of birth.
    c. Whether you have any children from a previous relationship or marriage, and their name(s).
    d. Do you have any grandchildren? Please provide their names and ages.

3. How you want your money divided after your death and when you want it distributed.
    a. If your children are minors, when and how you want their money distributed. (Portions at different times, all at once, a certain amount per year until they are xx years old, etc.)
    b. If something were to happen to one of your children, would that child's share be split evenly between the other child(ren) if they left no living descendants (i.e. your grandkids)?
    c. If all children predecease you or you are all in the same car accident- how would your money be divided then?
    d. Any specific bequests? (Family heirlooms that need to go specific people, rental properties, etc.).

4. Who is in charge of making sure the money gets to the people in number 4? This person is your successor Trustee and executor and will make sure your money is distributed as you outline. If you are leaving anything up to this person's discretion, you should always make sure that your wishes or concerns are discussed with them in full.

a. A backup or two for this person if when you pass, they are unable or unwilling to do it.

5. If your child(ren) are under 18, we will need to outline who will have custody of them if you and your spouse/ co-parent dies before they turn 18.
   a. A backup or two for this person.

6. A list of any properties you own.

7. A list of your financial assets to be included in the Trust. This includes last four digits and approximate value of all bank accounts that carry balances over $50,000 on a regular basis. This includes retirement accounts and life insurance. We don't want or need the full account or exact amount – round to the nearest $5,000. Example: TD Ameritrade, 401(k) ending in 1234, $130,000.

8. Do you have a safety deposit box? If so, where is located and who has access to it?

9. Healthcare- A Healthcare Power of Attorney is included in our packages. This document appoints agents for you in the event you are unable to make healthcare decisions on your own. We will need the names, addresses and phone number for your three agents, in the order you would like them. Most married couples name each other first, then two successor agents.

10. Anything else that you feel we should know or that you want to discuss?