



Initial Trust / Will Consultation Questions

1. Family Information:
 - a. Full name(s) and Date(s) of Birth for you and/or your spouse
 - b. Full names and dates of birthday for your children
 - c. Full names of your grandchildren and their approximate ages
2. How do you want your money divided after your death and when you want it distributed?
 - a. If your children are minors, when and how do 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.).
3. Who is in charge of making sure the money gets to the people in number 2 above? This person is your successor Trustee and / or executor and will make sure your money is distributed as you outline.
 - a. A backup or two for this person if when you pass, they are unable or unwilling to do it.



4. If your child(ren) are under 18, who will have custody of them if you and your spouse/ co-parent die before they turn 18?
 - a. A backup or two for this person.
5. A list of any properties you own.
6. A list of your financial assets to be included in the Trust. This includes any financial accounts or assets that carry balances over \$50,000 on a regular basis. This includes retirement accounts and life insurance. We don't want or need the account numbers, but we do need to know what type of account of it is, where it is held and the approximate value. Example: TD Ameritrade, 401(k), \$130,000.
7. Do you have a safety deposit box? If so, where is located and who has access to it?
8. 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.
9. Anything else that you feel we should know or that you want to discuss?