

CLIENT

Name:

Name as you want it to appear on document, if different:

Mailing Address:

City: State: Zip:

Phone Number: Email Address:

Date of Birth: US Citizen: Yes No

Occupation:

Did you sign a pre- or post-marital agreement?:

Name of investment advisor: Name of CPA/Accountant:

Agree to receive invoices via email

SPOUSE (if any)

Name:

Name as you want it to appear on document, if different:

Mailing Address:

City: State: Zip:

Phone Number: Email Address:

Date of Birth: US Citizen: Yes No

Occupation:

FIDUCIARIES

Personal Representatives/Trustees – As Personal Representative, the people you name would be responsible for paying your last illness and burial expenses, probating any assets that you own outside of a Trust, and ensuring the appointment of the guardians and conservators of your minor children, if any. They were formally known as the “executors” of an estate. As Trustee, the people you name would be responsible for the management and investment of all Trust assets, including determining the amount and frequency of distribution to the beneficiaries of the Trust.

First:

Second:

Third:

Guardians – (for minor and/or disabled children) – These individuals would be responsible for raising your minor children (children under 18) as well as any disabled children. Guardians would not be responsible for the assets you leave your children, unless they are also named the Trustees. They would be responsible for educational, housing and medical decisions.

First:

Second:

Third:

Medical Power of Attorney – If you were physically unable to make medical decisions on your own behalf during your lifetime, who would you want to make those decisions for you?

First for Client:

Second for Client:

First for Client:

Second for Client:

Financial Power of Attorney – Is there anyone you want to empower to make financial decisions on your behalf? (Note: A Financial Power of Attorney is a very powerful document and should only be given to individuals you have absolute confidence in, but is very beneficial if you were out of town or were disabled and could not make such current decisions.)

First:

Second:

Third:

TABLE OF ASSETS

York Howell & Guymon

Real Estate

Current Fair Market Value

Client/Spouse

TOTAL ESTATE VALUE:

MINUS DEBTS:

NET VALUE:

Bank Accounts

Current Fair Market Value

Client/Spouse

Pre-Tax Retirement Plans

Current Fair Market Value

Client/Spouse

After Tax Investment

Current Fair Market Value

Client/Spouse

