

**BARNES LAW**  
BUSINESS AND ESTATE PLANNING

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**Estate Planning Information  
Personal and Confidential**

**Husband's name:** \_\_\_\_\_ **DOB:** \_\_\_\_\_

Home address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employer: \_\_\_\_\_ **Position:** \_\_\_\_\_

Business address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Home phone: \_\_\_\_\_

Business phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Bank affiliation: \_\_\_\_\_

Safe deposit location: \_\_\_\_\_

Accountant: \_\_\_\_\_  
Name Address Tel. No.

Financial Advisor: \_\_\_\_\_  
Name Address Tel. No.

Place of birth: \_\_\_\_\_

**Wife's name:** \_\_\_\_\_

DOB: \_\_\_\_\_

Employer: \_\_\_\_\_

Position: \_\_\_\_\_

Business address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Place of birth: \_\_\_\_\_

Years married: \_\_\_\_\_

First/Second: \_\_\_\_\_

Living children:

1. Name: \_\_\_\_\_

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

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Age: \_\_\_\_\_

Natural Parents: \_\_\_\_\_

Married? \_\_\_\_\_

Children/ages: \_\_\_\_\_

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Notes for this child: \_\_\_\_\_

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2. Name: \_\_\_\_\_

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

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Age: \_\_\_\_\_

Natural Parents: \_\_\_\_\_

Married? \_\_\_\_\_

Children/ages: \_\_\_\_\_

\_\_\_\_\_

Notes for this child: \_\_\_\_\_

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3. Name: \_\_\_\_\_

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

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Age: \_\_\_\_\_

Natural Parents: \_\_\_\_\_

Married? \_\_\_\_\_

Children/ages: \_\_\_\_\_

\_\_\_\_\_

Notes for this child: \_\_\_\_\_

\_\_\_\_\_

4. Name: \_\_\_\_\_

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

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Age: \_\_\_\_\_

Natural Parents: \_\_\_\_\_

Married? \_\_\_\_\_

Children/ages: \_\_\_\_\_

\_\_\_\_\_

Notes for this child: \_\_\_\_\_

\_\_\_\_\_

Deceased children:

<i>Name/Parent</i>	<i>Age at d.</i>	<i>Married?</i>	<i>Children?</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## QUESTIONS TO CONSIDER

1. Do your children, grandchildren, or others you feel responsible for have any problems or special needs which should be considered in designing your estate plan?

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2. Do you have the responsibility for supporting anyone other than your spouse and children?

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3. Do you wish to make any gifts or contributions of property or money to any friends, relatives, or charities?

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4. If you, your spouse, and all of your descendants (children, grandchildren, etc.) were killed in a plane crash, whom would you want to have your property? (Have your spouse answer this question separately.)

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5. Do you want to designate a guardian or conservator for your children under 18 in case the other parent does not survive? (Think about a successor to the original guardian also.) A guardian primarily makes personal (rather than financial) decisions; the conservator makes financial decisions.

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6. If you wanted an individual to serve as Executor or Trustee (with or without a Bank as Co-Executor or Co-Trustee), whom would you name? (Think about a successor also.)

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7. Powers of attorney are often used to authorize someone to act for you under certain conditions, especially legal incapacitation. Whom would you like to name as your agent (and successor agent) under such a power? Powers of attorney are revoked by death. We can condition the effectiveness of the powers on a physician's certifying the principal's inability to manage his or her own affairs.

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8. Are both spouses U.S. citizens?

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9. Any previous marriages/divorces?

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10. Do you wish to be buried or cremated?

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11. Do you expect to inherit any substantial property in the near future which should be considered in planning your estate?

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12. Do you have any assets that require special consideration in your will?

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13. It may be helpful for you to bring your present wills (if any) and also insurance policies, deeds, trust agreements, buy-sell agreements, or other documents or contracts affecting your estate to the planning session.

## ESTATE EVALUATION

<i>KIND OF ASSET</i>	<i>Husband</i>	<i>Wife</i>	<i>Joint</i>
1. Residence (Note: A deed held by "H&W" normally means each owns one-half)	\$ _____	\$ _____	\$ _____
2. Other real property (include location by state)	\$ _____	\$ _____	\$ _____
3. Listed or traded securities	\$ _____	\$ _____	\$ _____
4. Closely held and untraded securities	\$ _____	\$ _____	\$ _____
5. Partnership or sole proprietor interests	\$ _____	\$ _____	\$ _____
6. Cash, savings accounts, CDs, etc.	\$ _____	\$ _____	\$ _____
7. Car(s)	\$ _____	\$ _____	\$ _____
8. Other personalty	\$ _____	\$ _____	\$ _____
9. Cash value (not face amount) of life insurance	\$ _____	\$ _____	\$ _____
10. Pension, profit-sharing, IRAs, etc.	\$ _____	\$ _____	\$ _____
11. Other	\$ _____	\$ _____	\$ _____
12. Other	\$ _____	\$ _____	\$ _____
<b>TOTAL GROSS ESTATE</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
Mortgages	\$ _____	\$ _____	\$ _____
Other debts	\$ _____	\$ _____	\$ _____
<b>NET TOTAL</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

Are you the beneficiary of any estate or trust assets that have not been distributed to you? (If yes, please bring the governing documents.)

Do you own any property jointly with any other person? (If so, is the ownership a joint tenancy with right of survivorship?)

Note: Having the information requested below would be helpful, but is not absolutely essential. Do the best you can to develop this information, but do not let this effort delay the planning process. If the answers are hard to get or time consuming, put a question mark.



Life insurance

<i>Insured</i>	<i>Owner Of Policy Company</i>	<i>Face Amount</i>	<i>Primary Beneficiary</i>	<i>Contingent Beneficiary</i>	<i>Is this a T (term) WL (whole life) U (universal policy) O (other)?</i>
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Benefit plans (pension, profit-sharing, IRAs, deferred compensation, etc.)

<i>Type of Plan</i>	<i>Benefit Provided or Amount</i>	<i>Death/ Contingent Beneficiaries (if any)</i>	<i>Comments</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____