ESTATE PLANNING

Important People & Their Contact Information

Husband	
Full Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Wife	
Full Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Date of Marriage:	
CHILDREN of this Marri	age:
□ yes	
□ no	
Child #1	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Does he/she have a	□ yes
child/children of their	□ no
own?	

Child #2 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?		
Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	Child #2	
Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	Name:	
Email: Date of Birth: Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	Address:	
Date of Birth: Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their open selection open selec	Telephone:	
Fiancé/Partner/Spouse: Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	Email:	
Do they have a child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	Date of Birth:	
child/children of their own? Child #3 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own?	, , =	
Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their one	child/children of their	
Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their one		
Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their or yes children or yes	Child #3	
Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their poor poor poor poor poor poor poor po	Name:	
Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their no	Address:	
Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their one	Telephone:	
Fiancé/Partner/Spouse: Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their	Email:	
Does he/she have a child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their	Date of Birth:	
child/children of their own? Child #4 Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their □ no	Fiancé/Partner/Spouse:	
Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a	child/children of their	
Name: Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a		
Address: Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a child/children of their	Child #4	
Telephone: Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a	Name:	
Email: Date of Birth: Fiancé/Partner/Spouse: Does he/she have a	Address:	
Date of Birth: Fiancé/Partner/Spouse: Does he/she have a □ yes □ no	Telephone:	
Fiancé/Partner/Spouse: Does he/she have a	Email:	
Does he/she have a child/children of their	Date of Birth:	
child/children of their		
<u>. </u>	child/children of their	

If you have more than 4 children, please provide the information requested above on a separate sheet of paper for those children.

HUSBAND's children fro	m a prior relationship:
□ yes	
□ no	
Husband's Child #1	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Does he/she have a	□ yes
child/children of their own?	□ no
OWII.	
Husband's Child #2	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Do they have a	□ yes
child/children of their own?	□ no
U VV II i	

Husband's Child #3	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Does he/she have a	□ yes
child/children of their own?	по
OWII:	
Husband's Child #4	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Does he/she have a	□ yes
child/children of their	
own?	□ no

If Husband has more than 4 children from a prior relationship, please provide the information requested above on a separate sheet of paper for those children.

WIFE's children from a p	orior relationship:
□ yes	
□ no	
Wife's Child #1	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Does he/she have a	□ yes
child/children of their own?	□ no
Wife's Child #2	
Name:	
Address:	
Telephone:	
Email:	
Date of Birth:	
Fiancé/Partner/Spouse:	
Do they have a	□ yes
child/children of their own?	□ no

□ yes □ no
□ yes □ no

If Wife has more than 4 children from a prior relationship, please provide the information requested above on a separate sheet of paper for those children.

Contact Information for ANYONE else you are listing anywhere in your Estate Plan

(whether as a beneficiary, health care surrogate, guardian, attorney-in-fact, successor trustee or funeral representative)

Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	

Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	
Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	

Name:	
Address:	
Telephone:	
Email:	
Relationship to you:	