

## Important People to Your Estate Plan

Client Name: \_\_\_\_\_

Date: \_\_\_\_\_

The following chart should list any person or organization that may be relevant to your estate planning (even people you don't want appointed or named). We have already typed in names and data that you have previously provided to us. Please be sure that data is complete and accurate and add whatever might be missing.

**Categories of People:** Try to list any person or organization that might be named in any of your estate planning documents for the following:

- Beneficiaries:
  - Current or primary beneficiaries.
  - Secondary, contingent or remainder beneficiaries.
  - Takers of last resort if everyone you've named is no longer living (e.g., charities).
  - Persons or organizations to receive specific bequest (e.g., a charity to receive a donation, as friend to receive a painting, etc.).
- Fiduciaries:
  - Executor.
  - Trustee.
  - Special executors or trustees (e.g., to have charge over a professional practice)
  - Include successors and alternates.
- Quasi-Fiduciaries:
  - Loan director (a person given the power to direct your trust to loan you money to create grantor trust status).
  - Charitable director (a person given the power to add a charitable beneficiary to your trust to create grantor trust status).
  - Trust protector (a person given selected powers, such as the right to change trustees).
  - Investment trustee or adviser (given the authority to direct trust investments).

**Complete Chart:** Please completely, fully and accurately fill in the chart below. If you provide me with complete and accurate data this can be inputted into our system by a secretary before any documents are drafted and thereby assure the accuracy and completeness of the names listed in all of your documents, save significant time and money for you, increase the accuracy of your documents and make changes in the future easier and less costly.

**Tips on Filling out Form:**

- Having all possible names in our system will save significant time and money, and assure more accurate documents.
- Any person who may possibly be named, even if you are unsure, should be listed. Inputting the names does not mean that the person will be named in any capacity, it just assures the availability of the data should it be needed.
- Anyone that you may wish to intentionally omit should also be listed with an indication of that wish. For example, if you are leaving a small cash bequest to four of your five grandchildren, please provide complete data on the excluded grandchild. If you are naming one sibling as an executor but prefer not to name the other, please provide the data for the sibling you wish to omit.
- Please err on the side of giving us names of any one they might possibly use since once in the system change is easy.

**Name Variations:** For your names please specify exactly how you wish to sign your documents. I recommend you use your formal legal name if possible. It is also important for you to list any common names you might also be known by so that we can list these in any documents. This should also be done for an agent as well. For example, someone may legally have retained their maiden name but socially use a married name. That second name should be listed in the documents in the event an issue arises as to identity. If you have any questions concerning this, the best approach is to include all names that might be relevant with an explanation.

**Completed Document:** Please return the revised/ completed document to me via facsimile (201-845-8433), email as a PDF, or via regular mail in the envelope provided.

**Questions:** If you have any questions or if I can help in any way please call or email me.

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### Important People to your Estate Plan

**How would you like your name to appear on legal documents?** While many people prefer a nickname, how you want your name listed on official documents can be very different. Please let us know about any middle initials, prefixes, suffixes, etc. you would like listed in your documents. (i.e. John A. Smith, Jr.)

Client Name: \_\_\_\_\_

Spouse/Partner Name: \_\_\_\_\_

| Name (first, middle, last)<br>[Other names known by] | Telephone Numbers<br>(Home, Cellphone, etc.) | Relationship | Address<br>Street<br>City, State<br>Zip Code | Indicate Status:<br>Beneficiary,<br>Remainder<br>Beneficiary,<br>Executor, Trustee<br>Excluded Person,<br>Other | Comment                    |
|--|--|--------------|--|---|----------------------------|
|  |  |              |  |   | SS # (Last 4 digits) _____ |
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Client Name: \_\_\_\_\_

**Important People to your Estate Plan- Continued**

| Name (first, middle, last)<br>[Other names known by] | Telephone Numbers<br>(Home, Cellphone, etc.) | Relationship | Address<br>Street<br>City, State<br>Zip Code | Indicate Status:<br>Beneficiary,<br>Remainder<br>Beneficiary,<br>Executor, Trustee<br>Excluded Person,<br>Other | Comment |
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