

**McGuireWoods LLP
Suite 2100, 1170 Peachtree Street, NE
Atlanta, GA 30309**

DATE _____

ESTATE PLANNING

WILL INFORMATION-CONFIDENTIAL

GENERAL INFORMATION	CLIENT	SPOUSE IF APPLICABLE
Full Name:	_____	_____
Home Address:	_____ _____ _____	_____ _____ _____
County of Residence:	_____	_____
Citizenship:	_____	_____
Telephone No. Home:	_____	_____
Business:	_____	_____
Date of Your Birth:	_____	_____
Children's Name and Dates of Birth: (if applicable)	_____ _____ _____ _____	_____ _____ _____ _____

Note: Marriage or birth or adoption of a future child or children will revoke your Will automatically unless specifically stated otherwise.

PROPERTY DISPOSITION

CLIENT

SPOUSE, IF APPLICABLE

How would you like to leave your property? Specify to whom and how, outright or in trust.

_____	_____
_____	_____
_____	_____
_____	_____

If all beneficiaries are deceased, how would you like to leave your property, such as to your heirs-at-law or to a charity or charities?

_____	_____
_____	_____

EXECUTORS, TRUSTEES and GUARDIANS *(Refer to glossary if needed)*

Who would you like to serve as executor or co-executors?

_____	_____
_____	_____
_____	_____

Who would you like to serve as successor executor or co-executors?

_____	_____
_____	_____

Who would you like to serve as trustee or co-trustees, if applicable?

_____	_____
_____	_____

Who would you like to serve as successor trustee or co-trustees, if applicable?

_____	_____
_____	_____

If applicable, who would you like to serve as guardian of any of your children who are under the age of 18 in the event your spouse predeceases you?

_____	_____
_____	_____

If applicable, who would you like to serve as successor guardian?

_____	_____
_____	_____

ADDITIONAL QUESTIONS

1. Are you interested in receiving information concerning a Georgia Advance Directive for Health Care? If so, who should be your agent(s) and successor agent(s) in your Advance Directive?

Agent(s)	Agent(s)
Successor Agent(s)	Successor Agent(s)

2. Are you interested in receiving information concerning a Durable Financial Power of Attorney to be used if you become incapable of handling your financial affairs? If so, who should be your attorney(s)-in-fact and successor attorney(s)-in-fact? Should the power only be effective upon the determination of your incapacity?

Attorney-in-fact(s)	Attorney-in-fact(s)
Successor Attorney-in-fact(s)	Successor Attorney-in-fact(s)

3. Are you interested in receiving information regarding the donation of your vital organs?

4. Do you currently have a will, advance directive for health care, living will or powers of attorney? If so, please provide us with copies.
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PLEASE COMPLETE IF YOUR TOTAL ASSETS EXCEED \$3,500,000

FINANCIAL INFORMATION (ESTIMATED)

<u>ASSETS</u>	<u>JOINT</u>	<u>CLIENT</u>	<u>SPOUSE IF MARRIED</u>
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Name of employer.	_____	_____	_____
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Retirement Plans and other Employee Benefits

Please give the name and address of the employee benefits coordinator, plan administrator, or other appropriate persons to obtain information about your retirement plans, employee benefits or deferred compensations.

_____	_____	_____
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If you receive annual statements of your retirement and other employee benefits from your employer, please attach the most recent statement from your employer.

Do you have any individual Retirement Accounts?

_____	_____	_____
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Give location and balance.

_____	_____	_____
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_____	_____	_____
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_____	_____	_____
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Home and Personal Property

Is your home in your sole name or owned jointly? If owned jointly, as tenants in common or right of survivorship?

_____	_____	_____
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Please provide Net Value (fair market value less mortgage or other home equity loan).

_____	_____	_____
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Please estimate the value of all personal property (i.e., car, jewelry, art, silver, furniture, clothing), excluding any investment collectibles set forth below.

Investments

Please indicate the amount of any of the following:

Cash and other Liquid Assets

Other Assets:

Life Insurance

**Please indicate total net value of all death benefits from life insurance policies on the life of each of you (excluding any accidental death).
*The attached chart may be helpful.***

TOTAL ASSETS

LIABILITIES

Please list all liabilities such as outstanding loans and pledges. Do not list home mortgages listed above (or home equity loans secured by your home) and exclude life insurance loans subtracted from the net death benefits listed above.

TOTAL LIABILITIES

TOTAL NET ESTATE VALUE

GLOSSARY OF ESTATE PLANNING TERMS

ESTATE	All assets owned by an individual at the time of death. The “probate estate” consists of all assets in your name that pass under your Will. The “taxable estate” includes most of the probate assets as well as life insurance, jointly owned property, benefits payable through deferred compensation plans, and other assets passing outside of the probate estate.
EXECUTOR	The individual or bank (or any combination) named in your Will to collect, preserve and distribute your estate. If you had no Will, this person would be referred to as an “administrator.” Sometimes more than one person is appointed and they serve jointly as <i>Co-Executors</i> .
SUCCESSOR EXECUTOR	The person named in your Will to serve as Executor if your first choice is unable or unwilling to serve.
GUARDIAN	The person named in a Will to take legal custody of minor children is the <i>guardian of the person</i> . If you are divorced, the surviving natural parent has the first legal right to custody of minor children. However, you can appoint someone else to manage the property of your children, a <i>guardian of the property</i> . Because guardians are subject to cumbersome reporting to the Court, it is usually preferable to create a trust for minor children.
CODICIL	An amendment or change made to an existing Will. A codicil must be properly drafted, executed and witnessed just like an original Will in order to be valid.
TRUST	A legal entity whereby a person (the trustee) holds legal title to the trust property and holds it for the benefit of another person (the beneficiary). You may decide how much discretion or control to give the trustee, who the trustee will be, the age for ultimate distribution to the beneficiaries, etc. Trusts are established for disability, tax reduction, gifts for minor children and charitable giving. A trust can be created during your lifetime (<i>inter vivos</i>) or in your Will upon your death (<i>testamentary</i>).

**TRUSTEE
SUCCESSOR TRUSTEE**

The individual or bank (or any combination) named in a trust to manage the trust. A successor trustee should be appointed in the event the original trustee is unable or unwilling to serve. Sometimes more than one person is appointed and they serve jointly as *Co-Trustees*.

**GEORGIA ADVANCE DIRECTIVE FOR
HEALTH CARE**

A document that allows you to choose someone to make health care decisions for you when you cannot.

LIVING WILL

A document that expresses your desire to allow the withdrawal of life support systems in the event of terminal illness or imminent death.

ANATOMICAL GIFT

The donation of your body or vital organ at death. This is usually best handled through a document separate from your Will.

JOINT OWNERSHIP

When more than one person holds legal title to property. There are two forms in Georgia: “joint tenancy with right of survivorship” and “tenants in common”. Each form produces different results in your estate and should be reviewed. The deed to real property will indicate the form of ownership.

QUALIFIED PLANS

Various types of pension and retirement plans, usually established by your employer, which accumulate tax free. These benefits are usually included in your taxable estate and the beneficiary designation should be reviewed for the best estate tax result as well as income tax treatment for the beneficiary named in the event of death.

