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# The Dove Firm

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Suite 102  
Arlington, TX 76011

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Fax: 817.462.0027  
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## Section 1. Personal and Family Data

Name(s): \_\_\_\_\_

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

\_\_\_\_\_

Best Contact: \_\_\_\_\_

## Section 2. Marital Status

Are you currently married? Yes No

Date & Place of Marriage: \_\_\_\_\_

Any marital or pre-marital agreement? Yes No

Any previous marriages? Yes No

## Section 3. Children

Please list your children's names, ages, and city/state of residence below:

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**Section 4. Current Instruments in Place.**

Do you currently have any of the following:

- \_\_\_\_\_ Wills
- \_\_\_\_\_ Powers of Attorney
- \_\_\_\_\_ Beneficiary Designations (on bank accounts, IRAs, etc.)
- \_\_\_\_\_ Trusts
- \_\_\_\_\_ Other Estate Planning Documents

*Please provide copies of any which are available.*

**Section 5. Distribution of Assets.**

Generally, how do you want your estate to be distributed?

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Your wills may establish basic trusts for any minor children, grandchildren or others who may inherit under your will. At what age do you wish for these trusts to terminate and distribute the assets outright to the children?

Do you currently own any real estate outside of Texas? \_\_\_\_\_

If so, where? \_\_\_\_\_

## **Section 6. Fiduciaries.**

*Please include address and phone numbers for your medical and financial powers of attorneys.*

Who do you want to act as your:

Executor: \_\_\_\_\_

1<sup>st</sup> alternate: \_\_\_\_\_

2<sup>nd</sup> alternate: \_\_\_\_\_

Trustee: \_\_\_\_\_

(if needed)

1<sup>st</sup> alternate: \_\_\_\_\_

2<sup>nd</sup> alternate: \_\_\_\_\_

Guardian for  
minor children: \_\_\_\_\_

(if needed)

1<sup>st</sup> alternate: \_\_\_\_\_

2<sup>nd</sup> alternate: \_\_\_\_\_

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Financial Power  
of Attorney: \_\_\_\_\_

1<sup>st</sup> alternate: \_\_\_\_\_

2<sup>nd</sup> alternate: \_\_\_\_\_

Medical Power  
of Attorney: \_\_\_\_\_

1<sup>st</sup> alternate: \_\_\_\_\_

2<sup>nd</sup> alternate: \_\_\_\_\_

**Note on Estate Taxes:**

The federal estate tax exemption for 2019 is \$11.4 million. If you believe your estate will be greater than \$11.4 million (including any benefits from life insurance) please ask us for a financial information sheet to complete.

**Note on Asset Protection:**

We also provide planning for individuals facing a need for long term care. If you are interested in learning more about these services (including Medicaid planning) we would be happy to discuss options for you or your loved ones during our initial meeting.