

THE DOVE FIRM PLLC

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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:

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?

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 property in another state? _____ Where? _____

Do you own a business? _____ What type? _____

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: _____

1st alternate: _____

2nd alternate: _____

Trustee:
(if needed) _____

1st alternate: _____

2nd alternate: _____

Guardian for
minor children: _____

(if needed)

1st alternate: _____

2nd alternate: _____

Financial Power
of Attorney: _____

1st alternate: _____

2nd alternate: _____

Medical Power
of Attorney: _____

1st alternate: _____

2nd alternate: _____

Note on Estate Taxes and Medicaid Planning:

As of 2022, the current federal estate tax exemption is \$12.06 million. If you believe your estate will be greater than \$12.06 million (including any benefits from life insurance) please ask us for a financial information sheet to complete.

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.