**A close-up of a logo

Description automatically generatedEstate Fiduciaries & Property Distribution**

**Spouse #1:** ( N A M E )

**Spouse #2:** ( N A M E )

Use this worksheet to prepare to discuss your estate planning wishes with your attorney.

**Spouse #1 Fiduciary Preferences: Select at Least 3 for Each Document**

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|  | **Will**  **Executor / Trustees** | **Guardian(s) for Minor Children** | **Property**  **POA**  **Agent** | **Medical**  **POA**  **Agent** | **HIPAA**  **Medical Info Release** |
| **#1** |  |  |  |  |  |
| **#2** |  |  |  |  |  |
| **#3** |  |  |  |  |  |
| **#4** |  |  |  |  |  |

**Spouse #2 Fiduciary Preferences: Select at Least 3 for Each Document**

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|  | **Will**  **Executor / Trustees** | **Guardian(s) for Minor Children** | **Property**  **POA**  **Agent** | **Medical**  **POA**  **Agent** | **HIPAA**  **Medical Info Release** |
| **#1** |  |  |  |  |  |
| **#2** |  |  |  |  |  |
| **#3** |  |  |  |  |  |
| **#4** |  |  |  |  |  |

**Spouse #1 Distribution Preferences**

1. **To whom would you like your property to go to at your death?**

(**Examples:** *All to my spouse. All to my children, divided equally. Half to John Smith, one quarter to Jane Jones and Sally Jones. To my children from a prior marriage. To my daughter Elizabeth. To my friend Martha.)*

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1. **If your spouse passes first, to whom would you like your property to go?**

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1. **Do you have any special property that you want certain people to receive, or would you prefer the simplicity having the executor divide property among beneficiaries?** A letter with your wishes to your executor can help with this, but would not be legally binding for them to follow exactly.

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1. **Would you like inheritances to be protected from your beneficiaries’ future creditors, predators, and any future divorcing spouses? If so, how long would you like that protection to last?** (**Examples:** *Yes, their entire life. Yes, until they reach age 35, etc.*)

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1. **Do you own any property out of state? If so, please describe.** (**Example:** *Yes, commercial rental property in the state of Washington.*)

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1. **Do you own a business? If so, please provide name, industry, number and names of owners, % ownership of each partner, and whether you have a buy-sell agreement or formal succession plan in place** (**Example:** *Yes, Acme Inc, gadget manufacturing, 3 partners, Jane Jones owns 50%, me and James Smith, each own 25%, no formal succession planning.*)

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1. **Have you made any major gifts before? Any prior planning? If so, please provide details.** (**Example:** *$20,000 to my son Jeff. $25,000 every year to charity. $500,000 to my daughter Jane in 2009. $1.5 million of company stock to an irrevocable trust for my children in 2007.*)

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**Spouse #2 Distribution Preferences**

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(**Examples:** *All to my spouse. All to my children, divided equally. Half to John Smith, one quarter to Jane Jones and Sally Jones. To my children from a prior marriage. To my daughter Elizabeth. To my friend Martha.)*

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