

CARTHEW LAW FIRM, PC

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Initial Meeting Date: _____

Joint Trust _____ Credit Shelter Tr _____ Will _____

| | Husband | Wife |
|-----------------|---|-------------|
| Name | | |
| Address | | |
| Home Phone | | |
| Work Phone | | |
| County | | |
| Soc. Sec. # | | |
| US Citizen: | Husband Y N | Wife Y N |
| Previous Trust: | Husband Y N | Wife Y N |
| EMAIL | | |
| | Prior Marriage: Husband: Y N Wife: Y N | |
| | Date of Trust: H: _____ W: _____ | |

| Children | Age | SSN? | Children: | Installment Ages/Shares |
|----------|-----|------|-----------|-------------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |

| | | | | |
|----|--|--|--|--|
| 7. | | | | |
| 8. | | | | |

SUCCESSOR TRUSTEE: _____
 (Personal Representative
 for Pour-Over Will are same.)

1. ALT. _____

2. ALT. _____

DURABLE POWER OF ATTORNEY: _____

1. ALT. _____

2. ALT. _____

MEDICAL POWER OF ATTORNEY: _____
 (Referred to as Patient Advocate)

1. ALT. _____

2. ALT. _____

GUARDIANS: _____

1. ALT. _____

GIFTS: _____

SUCCESSOR TRUSTEE: If you choose to avoid probate of your estate by executing a trust during lifetime, a successor trustee should be named. The successor trustee would be responsible for managing assets if you or in the case of a joint trust, either you or your spouse, could not manage assets due to any incompetence. The successor trustee would distribute assets to beneficiaries at death, or in a joint trust, after the deaths of both you and your spouse. Additionally, the successor trustee would manage assets for your children until they reach an age when you believe they should be capable of managing property on their own. The successor trustee can keep the children's money invested wisely and use it for their education, support, health and maintenance, until they reach the age specified in the trust for outright distribution of assets to them. The successor trustee can be a relative, friend, trust company or other person you trust and who shares your financial philosophy to manage and distribute assets according to your wishes as specified in the trust document. The successor trustee can be the same person named the children's guardian or could be a different person(s).

PERSONAL REPRESENTATIVES: A will should name a personal representative to probate the estate (if necessary), sign the final tax return, etc. (Personal representative is also sometimes referred to as executor or administrator). Most people name their spouse as primary representative, with a child, relative, or friend as alternate.

DURABLE POWER OF ATTORNEY – FINANCIAL: This person, called your attorney-in-fact, would have the ability to handle your financial affairs in the event that you are incapacitated or disabled. Most people name their spouse as primary power of attorney, with a child, relative or friend as alternate.

DURABLE POWER OF ATTORNEY – HEALTHCARE: Who should make medical decisions on your behalf, including decisions regarding medical consents, life support issues and nursing home admission if you were unable to make these decisions yourself? Most people name their spouse as their primary healthcare agent, with a child, relative or friend as alternate.

GUARDIAN: If you have children or an incompetent child, you need to appoint a guardian, who will be responsible for the day-to-day care of the child if you die or become incapacitated. It is a good idea to name an alternate guardian in the event that your first choice cannot serve.

ASSETS/DEBTS AND FINANCIAL ACCOUNTS

Please list all of your real property (with common address and parcel ID#):

Please list all financial accounts (with account number and approx value):

Please list all financial debts (with account number and approx value):

Please list all life insurance policies with approx cash or death benefit value: