

Estate Planning Meeting Preparation Worksheet

Information to Gather Before Your Consultation

How to Use This Worksheet

Estate planning works best when key information is organized in advance. You do not need exact figures. Estimates are sufficient for an initial meeting. **Complete what you can and bring this worksheet to your appointment.**

1: Personal Information

Client Name: _____

Date of Birth: _____

Spouse Name: _____

Date of Birth: _____

Address: _____

Phone / Email: _____

2: Family Information

- List of children (including prior marriages)
- Any minor children
- Any disabled beneficiaries
- Any financial dependents
- Any blended family considerations

Notes

3: Existing Documents

- Current Will
- Durable Power of Attorney
- Health Care Proxy
- Living Will
- Trust documents
- Property deeds

Notes

4: Asset Overview (Estimates Are Fine)

- Real estate (primary residence, rental property, land)
- Bank accounts
- Investment/brokerage accounts
- Retirement accounts (IRA, 401k, pension)
- Life insurance
- Business interests
- Safe deposit boxes
- Valuable personal property

Approximate Total Net Worth (if known): _____

Notes

5. Key Appointments to Consider

Executor: _____

Successor Executor: _____

Health Care Agent: _____

Successor Health Care Agent: _____

Financial Agent (Power of Attorney): _____

Successor Agent: _____

Guardian for Minor Children (if applicable): _____

Notes

6: Planning Priorities

Check all that apply:

- Keep administration simple for the family
- Avoid probate where possible
- Protect assets from long-term care costs
- Reduce potential tax exposure
- Provide responsibly for minor children
- Charitable giving
- Business succession planning

Top Priorities:

For guidance before taking major action, contact:

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