



11. Please provide a summary of your assets on the attached sheets. Indicate how property is owned (your name, spouse's name, or joint names); include cash value and face value of life insurance and beneficiary, and value of all assets taken into account in answering 9. above. You may substitute a recent financial statement for sheets A and B. If you have questions about any of your assets, such as the form of ownership or beneficiary designation, please bring in the relevant paperwork.
12. Does your computer need a password to operate?

Password lists: Do you utilize any of the following:

- Online banking
- Online trading (stocks, futures, etc.)
- Social networking, like Facebook, Twitter, Myspace, etc.
- Email
- Online commercial accounts (Sears, Craig's list, Ebay, etc.)

***Be prepared to discuss where you wish to keep these passwords and how you would like to continue to protect your passwords. We have suggestions that might be helpful to you.***

### ***LAST WILL & TESTAMENT INFORMATION***

1. Who will you choose to be the Executor or Executrix of your estate? Please list your first choice as well as an alternate. We will discuss the duties of an executor at our meeting.
2. Distribution of your estate when you are gone: See the page marked "Gifts" for instruction on the types of gifts you can leave. You can use the space on that page to make notes about your gifts.
3. Do you have a current Last Will & Testament? If so, please bring that with you to the meeting.
4. Do you have a Living Will? Power of Attorney? Health Care Power of Attorney? If so, please bring them to our meeting as well.
5. Do you have final funeral and burial arrangements in place? If so, please bring that information with you to our meeting. If not, we will help you address this issue in your Last Will & Testament.

## **GIFTS**

*Use this sheet to make notes of who will benefit from your last will & testament.*

*SPECIFIC GIFTS AND BEQUESTS* - These are personal or real property, tangible or intangible, or amounts of money or other assets which you desire to leave in your will to a specific person or entity. For example, "I leave my grandfather clock to my sister Sara," or "I leave \$5,000 and 100 shares of ATT Stock to my brother Ben." Please list the specific gifts. We will put in the proper legal language:

*RESIDUAL GIFTS* - This is the remainder of your estate. This is usually the largest part of your estate. You can leave this to one person or entity or to multiple individuals. For example, "I leave the residue of my estate to my wife, Wilma," or I leave the residue of my estate as follows: fifty (50) percent to the American Heart Association and fifty (50) percent to my grandchildren who survive me.

**SHEET "A"**

**Asset Summary**

	Husband	Joint	Wife
Life Insurance	_____	_____	_____
Residence	_____	_____	_____
Other Real Property	_____	_____	_____
Bank Account	_____	_____	_____
Bank Account	_____	_____	_____
Mutual Funds, Bonds, etc.	_____	_____	_____
Tangible Personal Property*	_____	_____	_____
Other Intangible Personal Property**	_____	_____	_____
Other Substantial Assets (Including Retirement Plan Accounts)	_____	_____	_____
Subtotal:	\$_____	\$_____	\$_____
Less Debts:	\$_____	\$_____	\$_____
Estimated Net Estate:	\$_____	\$_____	\$_____

\* Tangible Personal Property is anything of value that is not real property (ie, real estate) or intangible personal property, like stocks and bonds.

\*\* Other Intangible Personal Property is anything that does not fit neatly into the "Stock and Bonds" category, nor is it Tangible. This is our 'catch all' category which we can discuss.

## **SHEET "B"**

### **Life Insurance**

For Each Life Insurance Policy, please list the following:

Life Insurance Company  
Policy Number  
Face Amount  
Owner  
Insured  
Beneficiary  
Annual Premium  
Cash Surrender Value  
Type of Policy (Group, Term, Whole Life, U.L. etc.)

Life Insurance Company  
Policy Number  
Face Amount  
Owner  
Insured  
Beneficiary  
Annual Premium  
Cash Surrender Value  
Type of Policy (Group, Term, Whole Life, U.L. etc.)

Life Insurance Company  
Policy Number  
Face Amount  
Owner  
Insured  
Beneficiary  
Annual Premium  
Cash Surrender Value  
Type of Policy (Group, Term, Whole Life, U.L. etc.)

Life Insurance Company  
Policy Number  
Face Amount  
Owner  
Insured  
Beneficiary  
Annual Premium  
Cash Surrender Value  
Type of Policy (Group, Term, Whole Life, U.L. etc.)  
Also, Do you have Long Term Care Insurance?

## ***POWER OF ATTORNEY INFORMATION***

1. You are the principal -- the person appointing someone to act on your behalf through your Power of Attorney document. You will need to choose a person to be appointed as your agent for the Power of Attorney document. This needs to be a person in whom you have a high level of confidence. It need not be a family member, though it often is a family member. We discourage choosing two people to serve as co-agents. We will be glad to discuss this with you further at our meeting. Who would you like to have appointed as your agent?

NAME

ADDRESS

PHONE

2. You can appoint an alternate agent, in case your first choice is unavailable or unwilling to serve.

NAME

ADDRESS

PHONE

3. Oversight: You *may* choose a person to be a third-party over-seer of your agent. Your agent will be required, once each year, to report his or her activities, if there were any, to the over-seer. This over-seer will review the actions taken by the agent and take whatever steps are necessary, including taking no action, to insure that you, the principal, are being served well and that your agent is acting properly.

NAME

ADDRESS

PHONE

4. Your Agents Powers and Duties.

If there was a draft of the Power of Attorney document included with this correspondence, it is meant as an educational tool. It will give you information on the various choices which you will need to make in drafting your Power of Attorney document. Don't be overwhelmed by this document, or its length. We will walk you through the choices in this document, answering your questions to the best of our ability.

The Power of Attorney law in Pennsylvania changed dramatically in July of 2014. Those changes made it necessary to create this document. The final document which you sign will be considerably shorter than the one included with this mailing. This is the "kitchen sink" version, created by our office for you, to give you information about each power and duty. We will discuss each option with you -- all of the powers and duties -- to help you create the document that is right for you.

## ***HEALTH CARE POWER OF ATTORNEY***

Your Health Care Power of Attorney is designed to give the person you choose to be your Health Care Agent the authority to make medical decisions on your behalf in the instance when you are unable to make decisions for yourself.

"But wait," you may be saying.

"I thought that was what the Power of Attorney document was for."

And you are correct. . .sort of. The Health Care Power of Attorney has the added language which specifically addresses your medical care. More importantly, this document includes the HIPAA language which is necessary for a health care provider to be able to discuss your medical history with your health care agent.

We will discuss each of the decisions you need to make on this document as well. The one question we want you to consider prior to our meeting is who you would like to choose as your health care agent? It may be the same person who is your agent on your Power of Attorney document.

NAME

ADDRESS

PHONE

Just as with your Power of Attorney document, you may choose an alternate health care agent.

NAME

ADDRESS

PHONE

## ***LIVING WILL***

The living will is an "end of life" document where you make your wishes known should you be in this position and not able to speak or communicate for yourself. Please review this document and be ready to discuss the options which you are given in this document. This is the shortest of all the Protective Documents, but it can take more time to answer these questions - these are life-and-death questions which sometimes have emotionally-charged answers.

Many of us have lived through the passing of a loved one, and answering these questions can bring back memories that we would sooner not have to re-live. Our suggestion is to look over this document, make notes on the document if you have any questions, and know that we will walk you through the process, answering all of your questions.