

**Estate Planning Information**

**Law Office of Thomas F. Sammons**

847-359-9610 Fax 847-359-1581

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<b>Name:</b>	<b>Address:</b>	<b>Phone:</b> (h) (w) e-mail:
Children:	Age(s)	Town and State if not living with you:
Are you a US Citizen? Yes___ No___  How is your health? Good_____ Average_____ Poor_____  If necessary, describe:	Have you been divorced? Yes___ No___  Have you signed a prenuptial agreement?	Do you have a prior will or trust? Yes___ No___
Other concerns:		

<b>Asset:</b>	<b>Amount</b>	<b>Name on account/beneficiary</b>
<b>Life Insurance:</b>		
<b>Retirement (includes 401ks, IRAs, Roth IRA):</b>	<b>Amount</b>	<b>Name on Account/Beneficiary</b>

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<b>Investment Accounts, Mutual Funds, Stocks and Bank Accounts, CDs</b>	<b>Amount</b>	<b>Name(s) on account</b>
<b>Real Estate (Address)</b>	<b>Value/Mortgage Amt.</b>	<b>Names on title</b>

**Trustee for Heirs/Children:**

The trustee manages money for your children. (Note: This can be the same person as the guardian or someone else. It should be someone reliable who uses good judgment.) The trustee acts for a longer time than the guardian, usually until the youngest child is at least age 25.

1. Primary Trustee will be \_\_\_\_\_

2. Secondary Trustee will be \_\_\_\_\_

**Power of Attorney for Health Care**

The person who will make health decisions for me if I could not is:

1. Primary Agent for Health Care \_\_\_\_\_

2. Secondary Agent For Health Care \_\_\_\_\_

**Other issues:**

**I want to leave funds to charity**

Yes \_\_\_ No \_\_\_ Maybe \_\_\_\_\_

**I want to leave funds to grandchildren**

Yes \_\_\_ No \_\_\_ Maybe \_\_\_\_\_

**I am concerned about the ability of a child of mine to manage money**

Yes \_\_\_ No \_\_\_ Maybe \_\_\_\_\_

**A child of mine has a disability**

Yes \_\_\_ No \_\_\_

**If you have no children under age 25, you are done.** Please call for a free consultation and bring this form to the appointment. Thanks for taking the time to complete the information sheet.

**If you have young children, or children under age 25,** please complete the next two pages.

**Guardian of Minor Children:**

If your children are under age 18 who will be their guardian, that is the person they live with and who makes legal decisions for them until age 18?

( Note: We do not suggest picking a “couple” as guardian. The guardian should be the person, usually a relative, that you want. There is no need to name the guardian’s spouse as co-guardian):

1. Primary Guardian will be \_\_\_\_\_

2. Secondary Guardian will be \_\_\_\_\_

**Terms of Trust for Children under 25**

If your children are under age 25, the trustee for the children’s health, support and education usually makes funds available. The children’s trust rider below is used to tell the trustee how to spend money for your children’s education, weddings, cars, etc. Ranking an item One (1) means it is a low priority for you and a ten (10) means a high priority. Each item can be a 10, they do not need to be ranked 1-10. Please insert your ranking for each item and any comments.

Guideline/Purpose	Rating each item 1-10 (1 is low priority, 10 is high priority)	Comments
Private School Before College		
Post graduate education		
Tuition, Room and board while in college		
Car at first age at which child can drive		
Car after college		
Down Payment on Business		
Down Payment on a Home		
Payment for first wedding		
Principal left to distribute at end of trust		
Funds to improve Guardian’s home		

All trusts need an end point. Generally, we suggest distributing to the children no sooner than age 25. The funds can be distributed as early as age 18, but usually the child is too young for a large distribution. Of course, the trustee is paying for their benefit until the distributions are made. Please indicate the percentage of the trust that you want distributed at the specified age. The ages below are just suggestions. Please use any other age that you wish. The ages below are just suggestions. The trust for my children will end at these ages:

25\_\_\_\_\_(%) 30\_\_\_\_\_(%) 35\_\_\_\_\_(%)