



7160 Preston Road, Suite 100 • Plano, Texas 75024 • Phone (469) 277-3400 • Fax (469) 277-3399

Thank you for retaining our firm to prepare your estate documents. We will need the following information in order to get started.

1. Full legal name: _____
Date of birth: _____

Spouse's full legal name: _____
Date of birth: _____

If married, are you and you spouse both US Citizens (impacts marital deduction)? Yes No

2. Home address: _____
City: _____ State: _____ Zip: _____ County: _____
Email: _____
Cell phone: _____ Spouse's cell phone: _____

3. Names and ages of your children. For step-children, please indicate whether it is your intention for them to inherit equally with any children born to you.

Children:
__ M __ F Full name: _____ DOB: _____
__ M __ F Full name: _____ DOB: _____
__ M __ F Full name: _____ DOB: _____
__ M __ F Full name: _____ DOB: _____
__ M __ F Full name: _____ DOB: _____

Stepchildren:
__ M __ F Full name: _____ DOB: _____

Child of: _____ husband _____ wife

Inherit equally: _____ yes _____ no

__ M __ F Full name: _____ DOB: _____

Child of: ___ husband ___ wife
Inherit equally: ___ yes ___ no

___ M ___ F Full name: _____ DOB: _____
Child of: ___ husband ___ wife
Inherit equally: ___ yes ___ no

___ M ___ F Full name: _____ DOB: _____
Child of: ___ husband ___ wife
Inherit equally: ___ yes ___ no

___ M ___ F Full name: _____ DOB: _____
Child of: ___ husband ___ wife
Inherit equally: ___ yes ___ no

4. Manner in which you wish to dispose of your estate. i.e., everything to go to spouse, and in event of spouse not surviving, to children. **We recommend you do a general bequest rather than specific bequests unless you have specific heirlooms, etc., that you wish to leave to certain persons.** A general bequest is merely a statement that all of your estate will be left to a certain person or persons.

___ General bequest
___ Specific bequests (please provide details on separate sheet)

5. Executor

You will need an executor and two-back up executors. An executor inventories your estate, pays your final debts and distributes the remainder to the beneficiary or beneficiaries. Typically, you would want to name your spouse, and then provide two back-up executors in the event your spouse predeceases you.

1st executor
___ M ___ F Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

2nd executor

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

3rd executor

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

6. **Contingent Trust** - If you have minor children, you will need a contingent trust for your children.

In the event you and your spouse die at the same time, or your spouse does not survive you, you need to ensure that the estate is managed for your children until they reach the age at which you are comfortable with them receiving the estate. Typically, we recommend age 25. The trustee will make distributions for their health, education, maintenance, and support until such time as they are entitled to receive the estate. The trust must have an ending date or it will be invalid.

7. **Trustees**

You will need a trustee and one back-up trustee. We recommend that these persons be the same as the **back-up executors**, not your spouse. (A contingent trust is created ONLY if the parent(s) creating the Will dies before the child(ren) reach the age of 25.)

1st trustee

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

2nd trustee

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

8. **Guardians**

If your children are minors, you will need to name guardians for them. The guardian should be someone other than your trustee as there is a potential conflict of interest between the two. If you are married, please ensure you and your spouse name the same guardian. Guardians may be located outside the country, however, please consider a temporary guardian to allow for travel arrangements to be made into the country.

1st guardian

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

2nd guardian

M F Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

9. **Powers of Attorney**

Statutory Power of Attorney (financial matters and property). We recommend that you name your spouse and two back-ups. This person serves the same type of role as an executor, so we recommend that you name the same persons who are named as executors in your will.

1st Power of Attorney

Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

2nd Power of Attorney

Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

3rd Power of Attorney

Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

10. **Medical Power of Attorney.** We recommend that you name your spouse and two back-ups. This document authorizes agents to make medical decisions on your behalf.

1st Medical Power of Attorney

Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

2nd Medical Power of Attorney

Full name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Relationship: _____

3rd Medical Power of Attorney

Full name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Relationship: _____

11. Physician's Directive

This document allows you to indicate what your preference is for life sustaining treatment. It becomes effective upon your incapacity *only if* you are certified as incapacitated and suffering from an irreversible or terminal condition. This is commonly referred to as a "living will." You will make your choice when you come in to sign the document.

Please forward the above information to our office. Once we have reviewed your information, we will contact you if we have any additional questions. If you have any questions, feel free to call us.

Sincerely,

**Bimal N. Saraiya, Nichole M. Manning, &
Khail Hayes**

Saraiya Plc
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