

POST WARREN LINDSTROM, LLP

A Law Partnership of Professional Associations

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ESTATE PLANNING INFORMATION

GENERAL INFORMATION:

Your name: _____ Date of birth: _____

Spouse's name: _____ Date of birth: _____

Address (including zip code): _____

Home Telephone Number: (____) _____ Work Telephone Number: (____) _____

Email: (you) _____ (spouse) _____

Prior marriages: Yes/No, explain: _____

Child's name	Date of Birth	City/State of Residence
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_____	_____	_____
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_____	_____	_____
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_____	_____	_____
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Grandchild's name	Date of Birth	City/State of Residence	Parent is (which one of your children)
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_____	_____	_____	_____
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_____	_____	_____	_____
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_____	_____	_____	_____
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_____	_____	_____	_____
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INFORMATION FOR YOUR LAST WILL AND TESTAMENT:

Please indicate the individual and/or entity (or combination) you would like to serve as Executor of your Last Will and Testament, and city and state of residence/location. Generally a spouse would serve as the first Executor and another individual or entity (or combination) as alternate Executor if the spouse cannot serve:

Your Will: Executor: _____ City _____ State _____

Alternate: _____ City _____ State _____

Spouse's Will: Executor: _____ City _____ State _____

Alternate: _____ City _____ State _____

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INFORMATION FOR YOUR REVOCABLE LIVING TRUST:

If you decide to establish a revocable living trust, please indicate the individual and/or entity you would want to serve as trustee (manager of the trust assets) in the event you cannot serve. Generally, if you are unable to serve as trustee due to death or incapacity, a spouse would be named as successor trustee and after the spouse another individual and/or entity (or combination) would be named as trustee (or co-trustees).

Your Trust: Trustee: _____ City: _____ State: _____

Successor: _____ City: _____ State: _____

Spouse's Trust: Trustee: _____ City: _____ State: _____

Successor: _____ City: _____ State: _____

GUARDIAN/CONSERVATOR INFORMATION:

If you have minor children and both of your children's parents are deceased, who would you want to take care of your children (called a guardian) and your children's assets (called a conservator)? If the Guardian and Conservator are the same, simply indicate "Same."

First Choice for Guardian: _____ City: _____ State: _____

Relationship to your children: _____

Second Choice for Guardian: _____ City: _____ State: _____

Relationship to your children: _____

First Choice for Conservator: _____ City: _____ State: _____

Relationship to your children: _____

Second Choice for Conservator: _____ City: _____ State: _____

Relationship to your children: _____

POWERS OF ATTORNEY:

A General Durable Power of Attorney generally only takes effect only upon your incapacity and gives a named individual (your agent) authority to effectively do anything and everything you could have done had you not become incapacitated.

A General Durable Power of Attorney for Health Care Decisions permits your agent to make medical care decisions for you upon your incapacity.

Included in your General Durable Power of Attorney is a provision that gives your agent authority to sell your personal residence in the event such a sale becomes necessary. For example, if you are admitted to a nursing home and there is no possibility you will return to your home. To complete this provision, I will need the legal description for your residence, such as the Deed to your residence.

With all of the powers of attorney, a spouse is generally named as the first agent and another individual named as the alternate agent if the spouse cannot serve. It is possible to have different agents for the various powers of attorney. If your agents are the same, simply indicate "Same."

General Durable Power of Attorney:

Your First Agent: _____ City _____ State _____

Alternate Agent: _____ City _____ State _____

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Spouse's First Agent: _____ City _____ State _____

Alternate Agent: _____ City _____ State _____

Durable Power of Attorney for Health Care Decisions:

Your First Agent: _____ City _____ State _____

Alternate Agent: _____ City _____ State _____

Spouse's First Agent: _____ City _____ State _____

Alternate Agent: _____ City _____ State _____

DISTRIBUTION OF YOUR PROPERTY UPON DEATH:

We will include provisions in your estate planning documents for the disposition of the largest portion (or all) of your property. However, with regard to tangible personal property, such as family antiques, jewelry, etc., it will be possible for you to indicate on a list (provided by our firm to you) who you would like to receive such items of tangible personal property. The most important aspect of the list is that it can be changed by you from time to time without the assistance of an attorney.

With regard to the assets of your estate, describe who you would like to receive your property: _____

Are there any special needs you need to address for a child, grandchild, or other heir, such for special educational, medical, or other needs? Do you have any special requests with regard to certain property (such as family-owned real estate that you want to remain in your family)?

Are there any specific bequests of property you would like to make, such as a cash gift to an individual, church, or other charity? If so, please list.

Gift to: _____ City _____ State _____

Description of property to be gifted: _____

Gift to: _____ City _____ State _____

Description of property to be gifted: _____

DESCRIPTION OF ESTATE: To properly advise you with regard to estate taxes and planning to minimize various taxes, we will need a complete list of property, including the items described below. Please designate how the property is held (i.e., in sole ownership, joint tenancy, tenancy in common, etc.), in whose name the property is held, specify account numbers and names of institutions or group plans and provide an estimated fair market value or current balance.

Real Property - Please provide a copy of the deed or complete legal description.

ESTATE PLANNING INFORMATION

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Personal Property - Special collections such as stamps or coins, paintings, etc. (anything that would stand out from the common description most people apply to the term "household goods").

Life Insurance

Retirement Plans, Annuities, IRAs

Banks Accounts

Publicly Traded Stocks, Bonds, Mutual Funds, etc

Vehicles, Motorcycles, Boats, etc

Closely-Held Business - Please provide **name of owner(s)**, recent financial statement, type of entity (i.e., corporation, partnership, sole proprietorship) and estimated value of your interest.

Limited Partnership - Please provide copy of most recent K-1 and partnership return, original cost, and estimated value.

Do you currently receive income or principal distributions from any trust (such as a trust established by a deceased parent)? If so, please describe. _____

Do you anticipate receiving any inheritance? If so, please describe. _____

Please provide a copy of the last year's income tax return.

If you have a current Last Will and Testament and/or Trust, please furnish us a copy for our files (we can make copies during our meeting if you bring the documents with you).

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INFORMATION REQUESTED

Please list on this document or on other documents organized in a similar fashion all the property which you currently own or have an interest in along with the additional information regarding that property, including its fair market value. Any debts or mortgages should be listed immediately following the property which has been granted as security for that debt. In the event you have unsecured debt, please list it on a separate document and indicate its current balance and amortization schedule. All of this information will be kept in the strictest of confidence and will be used solely to evaluate the best method to provide an efficient transfer of that property to your desired heirs and to ascertain what possible tax consequences might occur as a result of those transfers. A completed sample follows.

I. Property

Description of Property (or debt)	Current Ownership	Estimated Fair Market Value

II. Life Insurance

Insured Individual	Owner of Policy	Designated Beneficiary	Death Benefits	Cash Value

III. Retirement Plans and Annuities

Owner of Account/Policy	Designated Beneficiary	Estimated Current Value

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SAMPLE

I. Property

<u>Description of Property (or debt)</u>	<u>Current Ownership</u>	<u>Estimated Fair Market Value</u>
Personal Residence	John and Jane Doe, Joint	\$250,000
Mortgage		(100,000)
Farm Land	John Doe	\$100,000
Checking Account	John and Jane Doe, Joint	\$5,000
Brokerage Account	Jane Doe	\$150,000
Brokerage Account	John and Jane Doe, Joint	\$100,000
Personal Property	John and Jane Doe, Joint	\$50,000
Automobiles	John and Jane Doe, Joint	\$70,000
Dental Practice	John Doe	\$200,000
IBM Stock	Jane Doe	\$350,000

II. Life Insurance

<u>Insured Individual</u>	<u>Owner of Policy</u>	<u>Designated Beneficiary</u>	<u>Death Benefits</u>	<u>Cash Value</u>
John Doe	John Doe	Jane Doe	\$100,000	Term
John Doe	John Doe	Jane Doe	\$250,000	\$20,000
Jane Doe	Jane Doe	John Doe	\$150,000	Term
Jane Doe	Jane Doe	John Doe	\$50,000	\$3,000

III. Retirement Plans and Annuities

<u>Owner of Account/Policy</u>	<u>Designated Beneficiary</u>	<u>Estimated Current Value</u>
John Doe 401(k) Plan	Jane Doe	\$200,000
John Doe Deferred Compensation	Jane Doe	\$100,000
Jane Doe IRA	John Doe	\$275,000
Jane Doe 401(k) Plan	John Doe	\$100,000