



CAPE COD  
HEALTHCARE  
FOUNDATION

# Planned Giving

An Investment in Cape Cod's Future

## A Personal and Charitable Financial Record

### The Importance of Estate Planning

A carefully constructed estate plan is vitally important for two reasons. First, it allows you to distribute your property in the manner, time, and amounts that you wish. Second, it permits you to take advantage of a variety of tax-minimizing techniques that can increase your family's security and make it possible to fulfill your personal and charitable objectives.

By completing this guide, you provide a source of vital information to those individuals who will be charged with the task of carrying out your final wishes. With careful planning and foresight, you can leave your family and friends with a plan that reflects the same legacy you built during your life.

Please contact us if we can provide sample language for your will or trust or share resources that can assist you in incorporating a charitable gift in your estate plan.

### Three steps to ensuring your legacy:

**Step 1:** Fill out and complete *A Personal and Charitable Financial Record*. Planning for your will takes careful preparation. So consider any outstanding decisions on your final wishes before completing the guide.

**Step 2:** Once complete, take the guide to your attorney. Your attorney will review your guide, help you make any final decisions, and prepare your will.

**Step 3:** Review your will regularly. Your plan should always reflect your current circumstances to ensure that those you love will be provided for according to your wishes.

# A Personal and Charitable Financial Record

## Table of Contents

- The Importance of Estate Planning** ..... 1
- I. Vital Statistics** ..... 3
- II. Employment and Business Interests** ..... 5
- III. Financial Information** ..... 6
- IV. Insurance** ..... 9
- V. Property** ..... 11
- VI. Obligations** ..... 16
- VII. Location of Important Papers** ..... 18
- VIII. Personal Advisors** ..... 19
- IX. Funeral and Burial Instructions** ..... 20
- X. Last Will and Testament** ..... 21
- XI. Philanthropic Interests** ..... 22
- Notes to executor** ..... 23
- A Complete Estate Plan Still Needs Periodic Review** ..... 23
- Contact Us to Discuss Your Gift Plans** ..... 23



# I. Vital Statistics

## A. Personal information

Name \_\_\_\_\_

Permanent address \_\_\_\_\_

Phone \_\_\_\_\_

Summer/winter residence \_\_\_\_\_

Phone \_\_\_\_\_

Business address \_\_\_\_\_

Phone \_\_\_\_\_

Date of birth \_\_\_\_\_ Place of birth \_\_\_\_\_

Social Security No. \_\_\_\_\_ Military service No. \_\_\_\_\_

Taxpayer identification No. \_\_\_\_\_

## B. Marital information

Current marital/relationship status

single  married  widowed  divorced  separated  significant other

Name \_\_\_\_\_

Date and place married \_\_\_\_\_

Marriage certificate located \_\_\_\_\_

Formerly married to \_\_\_\_\_

Date and place married \_\_\_\_\_

Marriage terminated by  death  divorce  annulment

Date and place terminated \_\_\_\_\_

Termination papers located \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**C. Family information\***

Father's name \_\_\_\_\_ Year of birth \_\_\_\_\_

Address \_\_\_\_\_

Mother's name \_\_\_\_\_ Year of birth \_\_\_\_\_

Address \_\_\_\_\_

Children's names, birth dates, addresses: (note if any children are adopted)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Brothers' and sisters' names, birth dates, addresses:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*If a family member is deceased, list names followed by "(deceased)."

Grandchildren's names, birth dates, addresses:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Personal comments \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



## II. Employment and Business Interests

Employer \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Date employed \_\_\_\_\_ Position \_\_\_\_\_

### Other business interests:

▪ Name of business \_\_\_\_\_

Type:  sole proprietorship  partnership  closely held corporation

Value of interest \$ \_\_\_\_\_

Disposition of business interests after death \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▪ Name of business \_\_\_\_\_

Type:  sole proprietorship  partnership  closely held corporation

Value of interest \$ \_\_\_\_\_

Disposition of business interests after death \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Charitable-planning pointer: A “redeemed” charitable gift.** A gift of closely held stock—C, S, LLC, or LLP—will produce a charitable deduction for the fair-market value of the shares and escape capital-gain tax on any appreciation. Later, the business could buy back the shares from the organization for cash.



### III. Financial Information

#### A. Banks

- Bank \_\_\_\_\_  
 Address \_\_\_\_\_  
 Type of account:  joint  individual  
 Account No. \_\_\_\_\_ Balance \$ \_\_\_\_\_  
 In name(s) of \_\_\_\_\_
  
- Bank \_\_\_\_\_  
 Address \_\_\_\_\_  
 Type of account:  joint  individual  
 Account No. \_\_\_\_\_ Balance \$ \_\_\_\_\_  
 In name(s) of \_\_\_\_\_

#### B. Certificates of deposit/money market certificates

- Bank \_\_\_\_\_ Amount \$ \_\_\_\_\_  
 Type \_\_\_\_\_ Maturity date \_\_\_\_\_
  
- Bank \_\_\_\_\_ Amount \$ \_\_\_\_\_  
 Type \_\_\_\_\_ Maturity date \_\_\_\_\_
  
- Bank \_\_\_\_\_ Amount \$ \_\_\_\_\_  
 Type \_\_\_\_\_ Maturity date \_\_\_\_\_

#### C. Retirement benefits

Pension plan/profit sharing

Description \_\_\_\_\_

Deferred-compensation plan

Payable as lump sum \$ \_\_\_\_\_ or \_\_\_\_\_ @ \$ \_\_\_\_\_ per \_\_\_\_\_ for \_\_\_\_\_ years



**Stock option, type** \_\_\_\_\_

Restrictions \_\_\_\_\_

**IRA/Keogh plan, other** \_\_\_\_\_

Amount invested \$ \_\_\_\_\_ Type of investments \_\_\_\_\_

Options available \_\_\_\_\_

**IRA/Keogh plan, other** \_\_\_\_\_

Amount invested \$ \_\_\_\_\_ Type of investments \_\_\_\_\_

Options available \_\_\_\_\_

**IRA/Keogh plan, other** \_\_\_\_\_

Amount invested \$ \_\_\_\_\_ Type of investments \_\_\_\_\_

Options available \_\_\_\_\_

**Annuities**

Source \_\_\_\_\_

Investment \$ \_\_\_\_\_ Payment terms \_\_\_\_\_

Source \_\_\_\_\_

Investment \$ \_\_\_\_\_ Payment terms \_\_\_\_\_

**Other retirement benefits** \_\_\_\_\_

\_\_\_\_\_

**Other retirement benefits** \_\_\_\_\_

\_\_\_\_\_

**Charitable-planning pointer: Leave the income-tax problem to our organization.** Most qualified retirement-plan benefits represent funds that have never been taxed—neither the original contributions nor their earnings. Consequently, distributions represent taxable income when they are paid out—even if they are paid out after death to someone other than the owner of the plan benefits. Collectively, such untaxed amounts are known as “income in respect of a decedent,” or IRD.

If you plan to make charitable provisions at death, items of IRD make an excellent choice to fund such gifts. **Reason:** Because we are tax-exempt, we do not pay income tax on items of IRD. It is far more beneficial to leave items of IRD to us and other assets to other beneficiaries.



**D. Lifetime and testamentary charitable gifts you have made or would like to make**

▪ **Organization** \_\_\_\_\_

Type of gift \_\_\_\_\_ Date \_\_\_\_\_

Phone \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

▪ **Organization** \_\_\_\_\_

Type of gift \_\_\_\_\_ Date \_\_\_\_\_

Phone \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

▪ **Organization** \_\_\_\_\_

Type of gift \_\_\_\_\_ Date \_\_\_\_\_

Phone \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

▪ **Organization** \_\_\_\_\_

Type of gift \_\_\_\_\_ Date \_\_\_\_\_

Phone \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

▪ **Organization** \_\_\_\_\_

Type of gift \_\_\_\_\_ Date \_\_\_\_\_

Phone \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## IV. Insurance

### A. Life Insurance

▪ **Company** \_\_\_\_\_

Face amount \$ \_\_\_\_\_ Policy No. \_\_\_\_\_

Description of policy \_\_\_\_\_

Date of issue \_\_\_\_\_ Premium \$ \_\_\_\_\_

\_\_\_\_\_ Due on \_\_\_\_\_

Insured \_\_\_\_\_ Policy owner \_\_\_\_\_

Beneficiaries: 1st \_\_\_\_\_ 2nd \_\_\_\_\_

Cash value \$ \_\_\_\_\_ Loan outstanding \_\_\_\_\_

Settlement options \_\_\_\_\_

\_\_\_\_\_

▪ **Company** \_\_\_\_\_

Face amount \$ \_\_\_\_\_ Policy No. \_\_\_\_\_

Description of policy \_\_\_\_\_

Date of issue \_\_\_\_\_ Premium \$ \_\_\_\_\_

\_\_\_\_\_ Due on \_\_\_\_\_

Insured \_\_\_\_\_ Policy owner \_\_\_\_\_

Beneficiaries: 1st \_\_\_\_\_ 2nd \_\_\_\_\_

Cash value \$ \_\_\_\_\_ Loan outstanding \_\_\_\_\_

Settlement options \_\_\_\_\_

\_\_\_\_\_

**Charitable-planning pointer: “Replacing” the value of a charitable gift with life insurance.**

There are many creative ways to use life insurance in your charitable giving. For example, you can simply designate our organization as the beneficiary of a policy you already own—or you can designate us the beneficiary of a new policy. If you have a policy that was taken out for a particular purpose that you no longer need—perhaps a policy purchased to ensure the availability of education funds in case of premature death—you can make a gift of the policy itself and obtain a tax deduction.



One of the most creative uses of life insurance in charitable planning is for “wealth replacement”: You make a significant charitable gift and use the resulting tax savings to purchase life insurance to replace its value in your estate.

Whether or not such a plan will work for you depends on your age and your insurability. If you are in good health, and depending on your age, you may buy more insurance with the tax savings.

Additional planning may yield even better results. Through the use of a life insurance trust, it may be possible not only to replace the value of the asset but to remove that value from your taxable estate. You will want to consult carefully with your legal and insurance advisors before undertaking such a plan. The benefits can be substantial.

## B. Health, medical, and other insurance policies

**Hospitalization** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Surgical** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Major medical** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Medicare supplemental** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Accident & health** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**General liability** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Homeowner's** \_\_\_\_\_ Policy No. \_\_\_\_\_

Company \_\_\_\_\_

**Automobile** \_\_\_\_\_ Company \_\_\_\_\_

Description of car \_\_\_\_\_ Policy No. \_\_\_\_\_

Description of car \_\_\_\_\_ Policy No. \_\_\_\_\_

## V. Property

### A. Residences

- Description \_\_\_\_\_ Date acquired \_\_\_\_\_
- Cost basis \$ \_\_\_\_\_ Addition to basis \_\_\_\_\_
- Current value: land \$ \_\_\_\_\_ + building \$ \_\_\_\_\_
- = total \$ \_\_\_\_\_ Date \_\_\_\_\_
- Mortgagee \_\_\_\_\_ Balance \$ \_\_\_\_\_
- Terms \_\_\_\_\_ Date \_\_\_\_\_
- Held:  jointly  community  tenants-in-common
- Names of other owners and percent contributed by each
- \_\_\_\_\_
- \_\_\_\_\_

- Description \_\_\_\_\_ Date acquired \_\_\_\_\_
- Cost basis \$ \_\_\_\_\_ Addition to basis \_\_\_\_\_
- Current value: land \$ \_\_\_\_\_ + building \$ \_\_\_\_\_
- = total \$ \_\_\_\_\_ Date \_\_\_\_\_
- Mortgagee \_\_\_\_\_ Balance \$ \_\_\_\_\_
- Terms \_\_\_\_\_ Date \_\_\_\_\_
- Held:  jointly  community  tenants-in-common
- Names of other owners and percent contributed by each
- \_\_\_\_\_
- \_\_\_\_\_

**Charitable-planning pointer: Make a gift of your home at death and enjoy tax benefits during life.** If you are planning to leave your farm or personal residence to our organization at your death, you may benefit from a special plan that makes your gift irrevocable during life. You can make a gift right now of the “remainder interest” in your farm or personal residence, retain a “life estate” that gives you the right to live there for the rest of your life, and claim a sizable current income-tax deduction. The amount of the deduction depends, among other factors, on both the value of your property and your age. Generally speaking, the more valuable the property and the older the donor or donors, the larger the deduction.



**B. Investment real estate**

▪ Description \_\_\_\_\_ Date acquired \_\_\_\_\_

Cost basis \$ \_\_\_\_\_ Addition to basis \_\_\_\_\_

Current value: land \$ \_\_\_\_\_ + building \$ \_\_\_\_\_

= total \$ \_\_\_\_\_ Date \_\_\_\_\_

Mortgagee \_\_\_\_\_ Balance \$ \_\_\_\_\_

Terms \_\_\_\_\_ Date \_\_\_\_\_

Held:  jointly  community  tenants-in-common

Names of other owners and percent contributed by each

\_\_\_\_\_

\_\_\_\_\_

▪ Description \_\_\_\_\_ Date acquired \_\_\_\_\_

Cost basis \$ \_\_\_\_\_ Addition to basis \_\_\_\_\_

Current value: land \$ \_\_\_\_\_ + building \$ \_\_\_\_\_

= total \$ \_\_\_\_\_ Date \_\_\_\_\_

Mortgagee \_\_\_\_\_ Balance \$ \_\_\_\_\_

Terms \_\_\_\_\_ Date \_\_\_\_\_

Held:  jointly  community  tenants-in-common

Names of other owners and percent contributed by each

\_\_\_\_\_

\_\_\_\_\_





**U.S. Bonds**

Type	Face amount	Issue date	Maturity date
_____	\$ _____	_____	_____
Serial No. _____			
_____	\$ _____	_____	_____
Serial No. _____			
_____	\$ _____	_____	_____
Serial No. _____			

**Tangible Assets**

Company/Item	Cost basis	Date acquired
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Trusts**

- Trustee \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_
- Attorney of record \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_
- Type of trust \_\_\_\_\_
- revocable  irrevocable Est. value \$ \_\_\_\_\_
- Retained powers, if any \_\_\_\_\_  
 \_\_\_\_\_



▪ Trustee \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Attorney of record \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Type of trust \_\_\_\_\_

revocable  irrevocable Est. value \$ \_\_\_\_\_

Retained powers, if any \_\_\_\_\_

▪ Trustee \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Attorney of record \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Type of trust \_\_\_\_\_

revocable  irrevocable Est. value \$ \_\_\_\_\_

Retained powers, if any \_\_\_\_\_

▪ What would you like the trusts to accomplish? \_\_\_\_\_

**Safe Deposit Box**

Box location \_\_\_\_\_

Box No. \_\_\_\_\_

Key location \_\_\_\_\_

**Cryptocurrency**

Issuer	Number of coins	Cost basis	Date acquired
_____	_____	_____	_____



**Other Investments**

Description \_\_\_\_\_

Value \_\_\_\_\_

**Charitable-planning pointer: Charitable gifts can make capital-gain taxes disappear.**  
 Federal tax laws provide some very special benefits for using appreciated securities and real estate to fund charitable gifts. Donors may be able to claim an income-tax deduction for the full fair-market value of the assets but do not have to recognize or pay taxes on any of the paper gain.

**VI. Obligations**

**A. Accounts receivable**

- Due from \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_  
 Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_  
 Comment \_\_\_\_\_
- Due from \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_  
 Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_  
 Comment \_\_\_\_\_
- Due from \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_  
 Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_  
 Comment \_\_\_\_\_

**B. Liabilities**

- Due to \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_  
 Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_  
 Comment \_\_\_\_\_



▪ Due to \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_

Comment \_\_\_\_\_

▪ Due to \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_ Terms \_\_\_\_\_ Due date \_\_\_\_\_

Comment \_\_\_\_\_

**C. Claims or lawsuits**

The following claims or lawsuits are pending:

\_\_\_\_\_  
\_\_\_\_\_

Attorney of record \_\_\_\_\_

Phone \_\_\_\_\_

Attorney of record \_\_\_\_\_

Phone \_\_\_\_\_

**D. Credit cards**

Company	Account No.	Line of credit
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



**E. Net worth**

Total assets—Sections II, III, IV and V: \$ \_\_\_\_\_

Total liabilities—Section VI: –\$ \_\_\_\_\_

**Net worth:** \$ \_\_\_\_\_**VII. Location of Important Papers**

Vital statistics \_\_\_\_\_

Last will and testament \_\_\_\_\_

Living trust agreement \_\_\_\_\_

(Some individuals have a living trust in addition to a will. The trust is revocable, and you, or you and your spouse, are entitled to all of the income while living. Then assets in the trust will be distributed to named beneficiaries. See Charitable-planning pointer below.)

Durable power of attorney \_\_\_\_\_

(This document designates someone you trust the authority to act on your behalf at whatever time you might become incapable of acting for yourself. It is an essential part of an estate plan.)

Living will \_\_\_\_\_

(This document, sometimes also called an “advance directive” or “directive to physicians,” provides instructions about the care you wish to receive if you are ever in a terminal condition and unable to speak for yourself. A living will should not be confused with a living trust.)

Power of attorney for health care decisions \_\_\_\_\_

(This is sometimes called a “health care proxy.” It empowers someone to act on your behalf regarding general decisions about health care—for example, selection of a long-term care facility. Some people prefer that the person who makes these decisions be different from the person given a durable power of attorney to handle financial matters.)

Guardianship of children and/or elderly parents \_\_\_\_\_

(Upon application, a person may be appointed by the court to act as guardian of a minor or elderly person unable to care for himself or herself. Please note here the location of any forms indicating that you have been appointed as guardian of someone or forms whereby you wish someone to serve as guardian of your minor children if you die before they are of legal age.)

Brokerage statements regarding securities investments \_\_\_\_\_

Cryptocurrency wallet and private key location information \_\_\_\_\_

Bank statements \_\_\_\_\_

Business agreements \_\_\_\_\_

Titles and deeds to real estate, vehicles, etc. \_\_\_\_\_

Tax returns from past years and tax information for current year \_\_\_\_\_

Charitable documents \_\_\_\_\_

(This would include gift agreements pertaining to the use of any contributions you have made, pledge agreements, etc.).



**Charitable-planning pointer: You might want to consider a living trust if:** (1) you want to maintain privacy because the trust is not a public record; (2) you would like to avoid costs and delays associated with probate; (3) you own real estate in a different state from where you live and want to avoid additional probate in that state; and (4) you want to provide for the management of assets in the event of incapacity. Even if you choose to have a living trust (which may or may not be necessary, depending on your situation), you still need a will to cover the disposition of property that was not transferred to the trust and to name a guardian for minor children. You can name our organization as a beneficiary of a living trust as well as under a will.

## VIII. Personal Advisors

- **Physician** \_\_\_\_\_  
Address \_\_\_\_\_  
Specialty \_\_\_\_\_ Phone \_\_\_\_\_
- **Physician** \_\_\_\_\_  
Address \_\_\_\_\_  
Specialty \_\_\_\_\_ Phone \_\_\_\_\_
- **Clergy person** \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_
- **Attorney** \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_
- **Accountant** \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_
- **Insurance agent** \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_
- **Trust officer** \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_

▪ **Investment broker** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

▪ **Tax consultant** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

▪ **Other** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

▪ **Other** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

▪ **Other** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

**Notes:**

\_\_\_\_\_  
\_\_\_\_\_

## IX. Funeral and Burial Instructions

▪ **Funeral director** \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

▪ **Religious affiliation** \_\_\_\_\_

Clergy person \_\_\_\_\_ Phone \_\_\_\_\_

▪ **Fraternal affiliation** \_\_\_\_\_

Officer \_\_\_\_\_ Phone \_\_\_\_\_



▪ **Designation of memorial gifts** \_\_\_\_\_

\_\_\_\_\_

Cemetery plot    Cemetery vault    None

▪ **Name, location** \_\_\_\_\_

Phone \_\_\_\_\_

Section No. \_\_\_\_\_ Plot No. \_\_\_\_\_

Location of deed \_\_\_\_\_

▪ **Other burial instructions** \_\_\_\_\_

\_\_\_\_\_

## X. Last Will and Testament

▪ **Executor under will** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Alternative \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

▪ **Guardian/Conservator** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Alternative \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

▪ **Trustee** \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Date of last will \_\_\_\_\_ Codicil \_\_\_\_\_

▪ **Attorney of record** \_\_\_\_\_

Phone \_\_\_\_\_





