

INFORMATION TO GATHER PRIOR TO STARTING THE QUESTION AND ANSWER SESSION

- Gather the full legal names and dates of birth for these people:

 Yourself;

- Your spouse (if you have one); and
- Your children (if you have any).

- Gather the full legal names and addresses for these people:

- The people you want to name to carry out your estate plan;
- The people you want to manage assets (e.g. Power of Attorney for Property);
- The people you want to make health care decisions for you in the event you are unable (e.g. Power of Attorney for Health Care); and
- The people you want to raise any children who are under age 18 when you die (e.g. Guardians).

- If you want to make specific cash gifts to anyone (for example, \$2,500 to your brother or a Church) this information:

- The full legal name of each person;
- The formal name of each organization (don't guess on this; ask the head of the organization for it); and
- The amount you want to give to each person or organization.

- Decide which one of the following sets of instructions regarding your Assets you want to use:

- Create shares for your children (or their descendants) and distribute the assets to the beneficiaries immediately;
- Create shares for your children (or their descendants) but keep the assets in trust for your beneficiaries to ensure they reach a certain age OR ages before having access to certain funds and/or to provide creditor and divorce protection; or
- Create shares for a list of people and/or charities and distribute the assets to the beneficiaries immediately.

- Gather information about your accounts, insurance policies, and property you own:
 - In whose name are your various bank/financial accounts and real estate owned and/or titled; and
 - Total amount of life insurance currently maintained.