



INFORMATION GATHERING DISCUSSION WORKSHEET

This purpose of this worksheet is to help you collect your thoughts in anticipation of our upcoming Information Gathering Discussion. You do not need to fill out and return this document.

A few general notes:

- You are asked below to name individuals to fill certain roles (trustee, health care agent, etc.). You are free to name *anyone you like*, including your own children and/or beneficiaries. Also, feel free to name the same individual(s) for multiple roles.
- If you are creating this estate plan as a couple, it is presumed that both of you are choosing the other as your first choice for all applicable roles (e.g., health care agent). Please let us know during our discussion if this is not the case.
- If you are uncertain about any of these decisions, it is better to come up with *something* to move the process along. We still must create a first draft and final draft, and there are also free changes for the first year. Do not let the process stall if you are only “almost sure” about something.

Most of our discussion will focus on information associated with the following questions:

1. Who would you want to manage your assets upon becoming incapacitated (Alzheimer’s, coma, etc.), and distribute them to your beneficiaries upon death? Name one or more back-ups as well.

2. If you were to be incapacitated, who would you want to speak on your behalf for *non-medical* issues? (e.g., filing your tax returns, etc.) Note that these responsibilities are remarkably like those in Question #1. Consider using the same individual(s) for both. Name one or more back-ups as well.

3. If you were to be incapacitated, who would you want to speak on your behalf for *medical* issues? (e.g., whether to move forward with a surgery, etc.) Name one or more back-ups as well.

4. To whom would you want your assets distributed upon your death? ...and in what manner? (outright, at certain ages, etc.) What if these individuals are deceased at the time of distribution?

5. If you were to be in a permanent vegetative state or irreversible coma, would you want life support withdrawn? Also, are you an organ donor? (Or would you like to be?)

6. If you have any minor children, who will serve as their guardian(s) should you be unable? Name one or more back-ups as well.
