

ESTATE PLANNING CHECKLIST

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Dear Prospective Client:

You have engaged Long Reimer Winegar LLP to consult with you in order to develop a recommendation as to your estate plan. Please fill out this checklist and return it to our office, or bring it with you to our initial meeting. If you have not scheduled an initial meeting with us, please call our office at your earliest convenience to do so.

In this checklist, we ask you many questions about your assets and how you would like to eventually distribute your property. For purposes of our initial meeting, do not agonize over the exact value of each of your assets. Please be as thorough as possible regarding the current ownership of assets (*i.e.* in whose name are assets currently titled), and the identification of assets (bank account numbers, insurance policy numbers, etc.) Finally, we anticipate that you may need further explanation at our initial meeting regarding answering the questions in the section entitled “Planning Information,” so again do not agonize if you are unsure as to how you would like to answer those questions.

At our initial meeting, we plan to go over your checklist and give you a recommendation as to your estate planning needs. If at that point you should decide to retain our firm to draft and implement an estate plan, we will then discuss our firm’s fee arrangements. If you decide to retain our firm, it is very likely that we will arrange a flat fee for drafting your estate plan that will include the time spent consulting with you up until and including our initial meeting. If you choose not to retain our firm after the initial meeting, you will be charged on an hourly basis for the time our attorneys have spent on your matter.

Please do not hesitate to call if you have any questions or concerns about this checklist or about your estate planning in general. We look forward to working with you soon.

Very truly yours,

LONG REIMER WINEGAR BEPPLER LLP

PERSONAL INFORMATION

Client's Full Legal Name _____
(name most often used to title property and accounts)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ County of Residence _____ Business Telephone _____

Employer _____ Position _____

Business Address _____ City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my E-mail address.

Divorced Widowed Single

CHILDREN/GRANDCHILDREN AND/OR OTHER FAMILY MEMBERS

Use full legal name:

Name	Birth date	Relationship
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_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

_____	_____	_____
Comments: _____		

ADVISORS

Name	Telephone
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Personal Attorney _____	_____
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Accountant _____	_____
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Financial Advisor _____	_____
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FAMILY QUESTIONS

(Please check "Yes" or "No" for your answer)	Yes	No
Are you receiving social security, disability, or other governmental benefits? <i>Describe</i> _____		
Are you now or have you ever been in the military or married to a person who was or is in the military? <i>Describe</i> _____		
Are you making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
Have you been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you ever filed federal or state gift tax returns? <i>Please furnish copies of these returns</i>		
Have completed previous will, trust, or estate planning? <i>Please furnish copies of these documents</i>		
Do you support any charitable organizations now that you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are there any other charitable organizations you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are you currently the beneficiary of anyone else's trust? <i>If so, please explain below.</i>		
Do any of your children or grandchildren have special educational, medical, or physical needs?		
Do any of your children or grandchildren receive governmental support or benefits?		
Do you provide primary or other major financial support to adult children or others?		

ADDITIONAL RELEVANT INFORMATION

PROPERTY INFORMATION INSTRUCTIONS

General Headings

This *Property Information* checklist is designed to help you list all the property you own and what it is worth. You probably will not own property under all the headings, if not just leave those blank. Under certain headings you may own more property than can be listed on this checklist. If so, use extra sheets of paper to list your additional property.

“Owner” of Property

How you own your property is extremely important for purposes of properly designing and implementing your estate plan. For each property please indicate how the property is titled. When doing so, please use the following abbreviations:

Owner of Property	Use
If own property in your name only	I
Joint Tenancy with another person	JT
Tenancy in Common with another person	TIC
If you cannot determine how the property is owned	?

REAL PROPERTY

TYPE: Any interest in real estate including your family residence, vacation home, time share, vacant land, etc.

General Description and/or Address	Owner	Market Value	Loan Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
	<i>Total</i>	_____	_____

FURNITURE AND PERSONAL EFFECTS

TYPE: List separately only major personal effects such as, jewelry, collections, antiques, furs, and all other valuable non-business personal property (*indicate type below and give a lump sum value for miscellaneous, less valuable items.*).

Type or Description	Owner	Market Value
Miscellaneous Furniture and Household Effects (Total) _____	_____	_____
_____	_____	_____
_____	_____	_____
	<i>Total</i>	_____

AUTOMOBILES, BOATS AND RVS

TYPE: For each motor vehicle, boat, RV, etc. please list the following: description, how titled, market value and lien on property, if any:

BANK & SAVINGS ACCOUNTS

TYPE: Checking Account "CA", Savings Account "SA", Certificates of Deposit "CD", Money Market "MM" (*indicate type below*). Do not include IRA's or 401(k)'s here

Name of Institution and account number	Type	Owner	Amount
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<i>Total</i>			<hr/>

Note: If Account is in your name (or your spouse's name) for the benefit of a minor, please specify and give minor's name.

STOCKS AND BONDS

TYPE: List any and all stocks and bonds you own. If held in a brokerage account, lump them together under each account. (*indicate type below*)

Stocks, Bonds or Investment Accounts	Type	Acct. Number	Owner	Amount
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Total</i>				<hr/>

LIFE INSURANCE POLICIES AND ANNUITIES

TYPE: Term, whole life, split dollar, group life, annuity. **ADDITIONAL INFORMATION:** Insurance company, type, face amount (death benefit), whose life is insured, who owns the policy, the current beneficiaries, who pays the premium, and who is the life insurance agent.

Total _____

RETIREMENT PLANS

TYPE: Pension (P), Profit Sharing (PS), H.R. 10, IRA, SEP, 401(K). **ADDITIONAL INFORMATION:** Describe the type of plan, the plan name, the current value of the plan, and any other pertinent information.

Total _____

BUSINESS INTERESTS

TYPE: General and Limited Partnerships, Sole Proprietorships, privately owned corporations, professional corporations, oil interests, farm and ranch interests. **ADDITIONAL INFORMATION:** Give a description of the interests, your ownership in the interests, and the estimated value of the interests.

Total _____

MONEY OWED TO YOU

TYPE: Mortgages or promissory notes payable to you, or other moneys owed to you.

Name of Debtor	Date of Note	Maturity Date	Owed to	Current Balance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
			<i>Total</i>	_____

ANTICIPATED INHERITANCE, GIFT, OR LAWSUIT JUDGMENT

TYPE: Gifts or inheritances that you expect to receive at some time in the future; or moneys that you anticipate receiving through a judgment in a lawsuit.

Description _____

Total estimated value _____

OTHER ASSETS

TYPE: Other property is any property that you have that does not fit into any listed category.

Type	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
		Total _____

SUMMARY OF VALUES

ASSETS	Amount*		Total Value
	Client	Other's	
Real Property	_____	_____	_____
Furniture and Personal Effects	_____	_____	_____
Automobiles, Boats and RV's	_____	_____	_____
Bank and Savings Accounts	_____	_____	_____
Stocks and Bonds	_____	_____	_____
Life Insurance and Annuities	_____	_____	_____
Retirement Plans	_____	_____	_____

Business Interests	_____	_____	_____
Money owed to you	_____	_____	_____
Anticipated Inheritance, Etc.	_____	_____	_____
Other Assets	_____	_____	_____
Total Assets:	_____	_____	_____

* *Values for property owned with other put your percentage in client's column and other's percentage in other's column.*

PLANNING INFORMATION

SPECIFIC GIFTS: List any specific gifts of real estate or cash gifts you wish to make to either individuals or charities.

	Individual or Charity	Amount

PERSONS TO ACT FOR YOU:

GUARDIAN FOR MINOR CHILDREN: If you have any children under the age of 18, list in order of preference who you wish to be guardian.

Name and Address	Relationship
_____	_____
_____	_____

INITIAL TRUSTEE(S): Usually you will be the Trustee of your own trust. This allows you to maintain control over your assets during life.

Name and Address	Relationship
_____	_____
_____	_____

DISABILITY TRUSTEE(S): If you were unable to make decisions for yourself, who would you want to make decisions for you with regard to your property and assets? Please name the individuals/entities in the order they are to serve. If they are to serve together, please indicate.

Name and Address	Relationship
_____	_____
_____	_____
_____	_____

SUCCESSOR TRUSTEE(S): After your death, who do you want carrying out your instructions, for distribution to and, if desired, management of property for your beneficiaries? Please name the individuals/entities in the order they are to serve. If they are to serve together, please indicate.

Name and Address	Relationship
_____	_____
_____	_____
_____	_____

PERSONAL REPRESENTATIVE(S) If you would like to name initial and successor personal representatives in your will that are different than those named as trustees above, please name those persons below. Otherwise we will name the same persons you name as trustees as personal representatives. Please name the individuals/entities in the order they are to serve. If they are to serve together, please indicate.

Name and Address	Relationship
_____	_____
_____	_____
_____	_____

TRUST PROTECTOR: Would you like to name a Trust Protector, or person who shall have powers over your trust, including the power to remove a trustee? If so please indicate below. Please name the individuals/entities in the order they are to serve. If they are to serve together, please indicate. (Note: Trust Protectors are usually named when a person is naming a corporate trustee, such as a bank.)

Name and Address	Relationship
_____	_____
_____	_____
_____	_____

POWER OF ATTORNEY: If you were unable to make financial decisions for yourself, who would you want to make those decisions for you?

Name	Relationship	Instructions or Guidelines
_____	_____	_____
_____	_____	_____
_____	_____	_____

ADVANCE HEALTH CARE DIRECTIVE: If you become unable to make medical treatment decisions for yourself in any circumstance not covered by your living will, who would you want to make those medical treatment decisions for you?

Name	Relationship	Instructions or Guidelines
_____	_____	_____
_____	_____	_____
_____	_____	_____

OTHER ITEMS TO INCLUDE OR DISCUSS: Please list any other items you would like to bring to our attention or discuss:
