

# HOWES & ANDERSON, P.C.

ATTORNEYS AT LAW  
4401 Westown Parkway,  
Neptune Bldg., Suite 302  
West Des Moines, IA 50266

RONALD L. ANDERSON  
E-MAIL: [RLA@IALAWFIRM.COM](mailto:RLA@IALAWFIRM.COM)  
RICHARD J. HOWES  
E-MAIL: [RICHARD@IALAWFIRM.COM](mailto:RICHARD@IALAWFIRM.COM)  
MOLLY K. ANDERSON  
E-MAIL: [MOLLY@IALAWFIRM.COM](mailto:MOLLY@IALAWFIRM.COM)

TELEPHONE  
(515) 225-9000  
FACSIMILE  
(515) 225-9360  
WEBSITE: [IALAWFIRM.COM](http://IALAWFIRM.COM)

## SINGLE PERSON ESTATE PLANNING CHECKLIST

Please provide the following information:

**YOUR NAME** (*how you want it to appear in legal documents*) \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Zip Code \_\_\_\_\_ County \_\_\_\_\_ Phone (*best number in an emergency*) \_\_\_\_\_

Date of Birth (*please call office if you do not wish to email*) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

U.S. Citizen? Yes \_\_\_ No \_\_\_ Employee or Business Owner? \_\_\_\_\_ Employer \_\_\_\_\_

**Do You Have Legal Insurance?** If so, please indicate below the name of the legal insurance company/plan, your Member ID/Plan Number and any case numbers or Case Assist forms you have received. Also, please provide the last 4 digits of plan holder's Social Security Number (*please call office if you do not wish to email*): \_\_\_\_\_

### CHILDREN

Please list all children (if any) born to or legally adopted by you:

	<u>Child's Full Name</u>	<u>Age</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____

5. \_\_\_\_\_  
 6. \_\_\_\_\_

**WILL INFORMATION**

**PRIMARY BENEFICIARIES:** *(Your estate may be left to children, relatives, charitable institutions, friends or anyone else you wish)* Please indicate the primary person or persons you wish to receive your estate assets:

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Amount/Percentage</u>	<u>Full Address</u>

**CONTINGENT BENEFICIARIES:** In the event that your primary beneficiaries do not survive you, please indicate your contingent beneficiaries:

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Amount/Percentage</u>	<u>Full Address (if not already listed)</u>

**EXECUTORS:** Individual(s) whom you would trust to close your estate by working with an Attorney and going through the probate process (if necessary) to settle your final debts, file tax returns and distribute your assets. You should name someone who has good business sense to be your Executor. You can name a single Executor or two or more people to serve as co-Executors. NOTE: *Naming at least one successor is **highly recommended***

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>

<u>Possible Successor Executor(s)</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>
<u>Name</u>			

**GUARDIANS:** Individual(s) whom you trust to be responsible for raising your children if you die before your children turn 18. *NOTE:* You can choose to name a married or committed couple to serve as joint Guardians, but please keep the possibility of divorce in mind! If you would *not* want one member of the couple serving as sole Guardian, you should only name the person you do trust.

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>
_____	_____	_____	_____
_____	_____	_____	_____

*Names of possible **successor guardian(s)** for your children if the above person(s) are unable to serve:*

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>
_____	_____	_____	_____
_____	_____	_____	_____

**BURIAL:** If you desire cremation or have any specific burial request, please specify below:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### TRUSTS

**CONTINGENT TRUST FOR CHILDREN:** In the event that you pass away while your children are young, you should appoint a Trustee to handle funds for the benefit of your children. Children cannot directly inherit money until they are at least 18 years old; however, many parents want to keep money in Trust until their children are older (*most commonly until children are age 25*). It is very important to choose a Trustee who is responsible with money. It is highly recommended that you also choose a successor Trustee in the event your chosen Trustee is unable or unwilling to serve. You can a single Trustee or two or more people to serve as co-Trustees.

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>
_____	_____	_____	_____
_____	_____	_____	_____

**Possible Successor Trustees**

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>
_____	_____	_____	_____
_____	_____	_____	_____

**TRUST DISTRIBUTIONS:** Please indicate the age at which you feel your children should receive outright distribution of trust assets:

Age \_\_\_\_\_ *Suggestion:* It is common to wait until children have completed their education and are mature enough to manage large amounts of money prudently before distributing trust assets. While trust assets *may* be distributed as early as age 18; age 25 is the common age of distribution.

**REVOCABLE TRUST:** A Revocable Trust may allow your estate to avoid the legal fees, court costs, time and publicity associated with probate. **ASK** your attorney if a Revocable Trust is right for your situation. All your assets (*there are some exceptions which your attorney will explain*) must be transferred into the name of the Trust or have beneficiary designations to avoid probate. You will serve as initial Trustee and will maintain full control over the Trust during your lifetime. You must name at least one **successor Trustee** who will step in and serve as Trustee in the event of your death or incapacity. You can name an individual Successor Trustee or two or more people to serve as Successor co-Trustees.

<u>Successor Trustee Name(s)</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address</u> (if not already listed)	<u>Phone Number</u> (if not already listed)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

### FINANCIAL POWER OF ATTORNEY

Your Financial Power of Attorney allows you to designate an Agent to manage your financial affairs in the event that you are incapable of making your own financial decisions. You can name a single Agent or two or more people to serve as co-Agents. *NOTE: Naming at least one successor is highly recommended*

**Who do you Trust to serve as your Financial Agent?**

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address</u> (if not already listed)	<u>Phone Number</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Successor(s) if the person(s) designated above cannot serve?**

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address</u> (if not already listed)	<u>Phone Number</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

### HEALTH CARE POWER OF ATTORNEY

Your Health Care Power of Attorney allows you to designate an Agent to make health care decisions for you in the event you are incapable of making your own health care decisions. You can name a single Agent or two or more people to serve as co-Agents. *NOTE: Naming at least one successor is highly recommended*

**Who do you Trust to serve as your Health Care Agent?**

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>	<u>Phone Number</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Successor(s) if the person(s) designated above cannot serve?**

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Full Address (if not already listed)</u>	<u>Phone Number</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**LIVING WILL**

You may want a Living Will if you do **not** want your life prolonged by administration of life-sustaining procedures when you are in an incurable or irreversible condition that will cause your death within a relatively short period of time or you fall into a state of permanent unconsciousness from which, to a reasonable degree of medical certainty, there can be no recovery

Would you like a Living Will?      Yes \_\_\_\_\_ No \_\_\_\_\_

**YOUR PROPERTY**

**IMPORTANT:** If you estimate the value of all your assets (including the payout value of life insurance, IRAs, 401(k) plans and other retirement plans; homestead and any other real estate and anticipated inheritances) might exceed **\$11,000,000.00** it is important that you disclose this to your attorney, as it may have a bearing on your estate planning. If you have a financial statement, please attach it. **If you own any real estate in another state, please tell your attorney.**

**ASSETS:** Please list your assets, how they are titled (sole ownership, joint tenancy, life estate, etc.) and the value below:

*NOTE:* If you are interested in a Revocable Trust, please locate the full **legal description** (from a deed or abstract of your property) of all real estate and give to your attorney.

	<u>Title</u>	<u>Value</u>
1. <u>Home</u>	_____	_____
2. <u>Other Real Estate:</u>	_____	_____
	_____	_____

