

Date: _____

McGUNAGLE & REIDY, LTD.

ATTORNEYS AT LAW

PAWTUXET VILLAGE

2088 BROAD STREET

CRANSTON, RHODE ISLAND 02905-3342

TELEPHONE (401) 941-2088

FAX (401) 941-0017

ESTATE PLANNING INFORMATION FORM

Upon completion, please mail these forms to our office prior to your appointment. In addition, we request that you attach a \$100 check to retain our services. Your check for \$100 will be applied to our fee for preparing your estate documents. Thank you.

Family Information

Please include middle names or initials, any aliases, etc.

1. Full Name: _____

Date of Birth: _____

U.S. Citizen or Permanent Resident Alien? Yes/ No _____ Any Other Passport/Citizenship Held _____

Social Security No.: _____

Telephone: Home: _____ Work: _____

2. Spouse or Partner Full Name: _____

Date of Birth: _____

U.S. Citizen or Permanent Resident Alien? Yes/ No _____ Any Other Passport/Citizenship Held _____

Social Security No.: _____

Telephone: Home: _____ Work: _____

3. Home Address: _____

Electronic Mail ("email") If you are accessible via email

4. Please list the given name of each child. If the child is married also list name of that child's spouse. If the child is deceased, give date of death. If you have any children by a prior marriage(s), please note.

Full Name: _____ Date of Birth: _____ Address: _____ Marital Status: _____

5. *If any of the children listed in Question 4 is a child of one spouse/partner only, please indicate.*

6. *Grandchildren:*

7. *Spouse/Partner 1's immediate family members: Parents, Brothers, Sisters, Others (please identify relationship):*

8. *Spouse/Partner 2's immediate family members: Parents, Brothers, Sisters, Others (please identify relationship):*

9. *Do you have an existing Will and/or a Trust Agreement? If so, please describe: Please bring a copy with you when we meet.*

10. *Do you have a safe deposit box? If yes, bank and branch where located:*

11. *.If you have a safe deposit box, who has the keys and/or legal access?*

12. *Are you owed substantial amounts of money by anyone? _____ If yes, please give details:*

13. *Have you made any loan to children which should be considered as advancements on that child's possible share in your estate?; if yes, please give details.*

14. *Do you expect to receive an inheritance or gift of any significant value? Please describe. Use Reverse side if needed.*

15. *Have you and your spous/partner e ever lived in any of the following places: Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Puerto Rico, Texas, or Washington? Yes _____ No _____*

Financial Advisors

Accountant/CPA_____

Address_____Telephone_____

Financial Advisor_____

Address_____Telephone_____

Fiduciary Information Please include middle names or initials, any aliases, etc.

1. *Choice of Executor/Co-Executor (please include full name, relationship if any and address):*

2. *Choice of Successor Executor/Co-Executor (please include full name, relationship and address):*

1st Alternate _____

2nd Alternate _____

3. *Choice of Trustee/Co-Trustee if a Trust will be created (please include full name, relationship and address):*

4. *Choice of Successor Trustee/Co-Trustee (please include full name, relationship and address):*

5. *Choice of Guardian/Co-Guardian for minor children, if any (please include full name, relationship and address):*

6. *Choice of Successor Guardian/Co-Guardian for minor children, if any (please include full name, relationship and address):*

7. *Powers of Appointment over trusts:*

Special Instructions

Special requests regarding funeral, cremation, or burial instructions are best handled by a Letter of Instruction or other statement (separate from your will) to your family or other responsible person. Organ donation is best handled in a Health Care Directive and noted on the person's drivers license.

Specific Bequests If you wish to make any gifts of specific property to any individuals, list each specific item and the beneficiary thereof.

Relatives Omitted Are there any relatives whom you specifically do not want to receive anything from your estate? Yes _____ No _____ If so, whom?

Feel free to use the space below (continuing on the reverse side if needed) to provide me with any other information you feel would be important in planning your estate. This might include other legal arrangements you might have made, or contracts you have entered into.

Other Items to Consider Prior to Initial Consultation

You should give some thought to the following matters before our initial consultation. For married couples and partners, I begin with the assumption that each of you wishes your estate to go to the other, and on the death of the surviving party, if you have children that you would like your estate to go to them eventually. You should designate a beneficiary or beneficiaries to receive your estate in the event that neither your spouse/partner nor children survive you. If your wishes are otherwise, or if your personal situation is different from the above we can discuss the possibilities.

When individuals have minor children, it is recommended that a trust be set up for those children. Generally, the trust provides that they are entitled to income and as much principal as they need for their health, maintenance, and education at least through college and that after a certain age (for instance 25 or years 30) they are to receive the property outright. Also, a provision should be made for guardianship of your minor children should both parents die during the child's minority. I suggest that you choose one party and at least one successor.

Someone must also be selected to carry out the terms of your estate planning documents. This person is referred to as the Executor/Executrix. This can be the surviving spouse/partner or a third party. I advise that a successor executor should be designated in case something happens to the party you originally choose. In smaller estates I generally advise you to choose a family member or third party rather than a corporate trustee. A corporate trustee in larger estates may be advisable if the facts so warrant.

PRIVACY NOTICE

Protecting your privacy is very important to us. As part of providing you with the legal services you have requested, we need to obtain pertinent personal information from you. That information includes, but may not be limited to, your address, date of birth, employment status, social security number, email, income, assets, account numbers, etc.

This information may be collected by telephone, in person, in writing, electronically via the internet or by any other means. It is with this information that we may fulfill and service your needs. We treat the information we gather about you in a confidential manner. The trust of our clients is one of our most valuable assets.

- *Employees of McGunagle and Reidy, Ltd. having access to your personal information are instructed to use strict standards of care regarding the confidentiality of your personal information.*
- *We expect persons or organizations that provide services on our behalf to keep client information confidential, using it only to provide the services we have asked them to perform.*
- *We do not disclose personal information to anyone, except as may be required by law, or at your direction.*

Should your relationship with us end, your personal information will remain protected in accordance with our confidentiality practices as outlined in this privacy notice.

Please feel free to call our office should you have any concerns or questions.

Thank you for your valued business.

