

Comprehensive Estate Plan Legal Documents



NAME OF CLIENT

DATE

NAME OF SPOUSE

DATE

easternplanning
inc
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NAME OF CLIENT

DATE

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DATE

	CLIENT		SPOUSE	
	YES	NO	YES	NO
1. Last Will and Testament				
2. Health Care Proxy and Designation of Guardian				
3. Combined Living Will and Durable Power of Attorney to Communicate Decision to Forego Life-Sustaining Treatment				
4. Durable General Power of Attorney				
5. Durable General Power of Attorney Effective at a Future Time				
6. Letter of Direction				
7. Gift Letter				
8. Specific Bequests (see worksheet)				
9. Disclaimer Provision				
10. Credit Shelter Trust				
11. Marital Trust				
12. Q TIP Trust				
13. Irrevocable Life Insurance Trust				
14. Lifetime Gifts				
15. Generation Skipping Tax				

NAME OF CLIENT

DATE

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EXECUTOR/EXECUTRIX

CLIENT

SPOUSE

Executor		
Successor		
Successor		
Successor		
Successor		

CHILDREN'S TRUST

CLIENT

SPOUSE

Trustee		
Successor		
Successor		
Successor		
Successor		

GRANDCHILDREN'S TRUST

CLIENT

SPOUSE

Trustee		
Successor		
Successor		
Successor		
Successor		

NAME OF CLIENT

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DISCLAIMER/CREDIT SHELTER

CLIENT

SPOUSE

Trustee		
Successor		
Successor		
Successor		

MARITAL TRUST

CLIENT

SPOUSE

Trustee		
Successor		
Successor		

Q TIP

CLIENT

SPOUSE

Trustee		
Successor		
Successor		

NAME OF CLIENT

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HEALTH CARE PROXY

CLIENT

SPOUSE

Health Care Representative		
Successor		
Successor		

GENERAL DURABLE POWER OF ATTORNEY

CLIENT

SPOUSE

Attorney-in-fact		
Successor		

DURABLE GENERAL POWER OF ATTORNEY EFFECTIVE AT A FUTURE TIME

CLIENT

SPOUSE

Attorney-in-fact (or)		
Attorney-in-fact		

NAME OF CLIENT _____ DATE _____

NAME OF SPOUSE _____ DATE _____

SPECIFIC BEQUESTS – MONEY

TO WHOM	RELATIONSHIP	CLIENT		SPOUSE	
		HOW MUCH	HOW MUCH	1ST SPOUSE	WHEN DEATH OF 2ND SPOUSE

SPECIFIC BEQUESTS – IN KIND

TO WHOM	RELATIONSHIP	CLIENT		SPOUSE	
		HOW MUCH	HOW MUCH	1ST SPOUSE	WHEN DEATH OF 2ND SPOUSE

SPECIFIC BEQUESTS – CHARITY

TO WHOM	RELATIONSHIP	CLIENT		SPOUSE	
		HOW MUCH	HOW MUCH	1ST SPOUSE	WHEN DEATH OF 2ND SPOUSE

DISTRIBUTION OF PRINCIPAL WORKSHEET PERCENTAGE AND AGES

TYPE OF TRUST	INCOME	1 ST		2 ND		3 RD		4 TH	
		AGE	%	AGE	%	AGE	%	AGE	%
Children's									
Grandchildren's									
Disclaimer/ Credit Shelter									
Marital Trust									
Q TIP									
ILIT									
Irrevocable Trust									

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