

Married with Minor Children Estate Planning Checklist

From: Lambert & Lambert PLC

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The following is a checklist of information and items that will be needed to plan your Estate and prepare your Estate Plan documents.

1. A copy of your latest Will or Trust (if you have either)
2. Your name as it should appear on the documents (e.g., middle name or no)
 - A. Your SS # and DOB
 - B. Your Driver's license #
3. Beneficiaries
 - A. Primary
 - B. Any successor beneficiaries
 - C. Any charitable beneficiaries, with amount or formula
4. Trustees
 - A. You will be the first Trustee for your Trust
 - B. You must name the Successor Trustee(s) who takes charge upon your death
 - i. You may name more than one to serve as co-Trustees
 - C. My advice is to name a second Successor Trustee (not required)
5. Personal Representatives - Will
 - A. You must name your Personal Representative(s)
 - i. You may name more than one Personal Representative
 - B. You should name at least one successor Personal Representatives
 - C. We will need addresses for all Trustees and Personal Representatives

6. Guardians
 - A. Appoint Primary and Contingent Guardians
 - B. Designate any special needs

7. Real estate holdings
 - A. Provide copy of deeds
 - B. In the alternative, provide addresses or property descriptions

8. Bank and Investment Accounts
 - A. Provide the last statement of each account
 - B. In the alternative, provide identifying information for each account
 - C. Do you own any property or accounts outside MI?

9. Special Will designations
 - A. Any special organ or body part donations
 - i. For science or donation only?
 - B. Any particular requests with respect to funeral, cremation, other

10. Patient Advocate form
 - A. Name Patient Advocate
 - B. Name successor or successors
 - C. Do you have any special instructions?
 - D. General instructions for life support
 - E. Do you spend significant time in other states?
(May need similar form for those states)

11. Durable Power of Attorney
 - A. Designate Attorney-in-Fact
 - B. Designate Successor Attorney-in-Fact (recommended)

12. Other Special Planning Needs

This Checklist covers only basic information and is not designed to be comprehensive. Your particular concerns will be addressed in consultation with the Estate Planner. Once you have completed this form, contact the professionals at Lambert & Lambert PLC to prepare your Estate Plan.

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