**Estate Planning Worksheet (Married People) – Instructions**

1. Each person should select a role as “Client #1” or “Client #2” and answer the questions on the form accordingly.

2. Fill out each client’s full name and social security number.

3. Indicate each client’s date of birth and whether each client is a U.S. citizen.

4. List the clients’ address.

5. Complete contact information should be provided for each client.

6. Each client should list their employment positions.

7. The date of marriage, and whether there is a prenuptial agreement, should be listed.

8. Each client should list their marital status and whether, if previously widowed, an estate tax return for the predeceased spouse was ever filed.

9. Each client should list the name, date of birth, and contact information for their children, if any, and the names and dates of birth of their grandchildren, if any.

10. If the clients have children who are minors (underage), they should list the persons they have selected to be guardians for their children until they reach the age of 18, in the event of both clients’ death.

11. Each client should list the persons they wish to serve as executors in their Will and successor trustees in their Trust.

12. Each client should list the persons they wish to serve as agents under their Health Care Power of Attorney or Advance Health Care Directive, as well as their personal funeral preferences.

13. Each client should list the persons they wish to serve as agents under their Durable Power of Attorney for Asset Management.

14. The clients should list the names and contact information for their financial and legal advisors.

15. The clients should describe how they wish their estate to be distributed after they pass away.

16. The assets of both clients should be listed, both separate property and joint/community property.

17. Life insurance policies of both clients should be listed, including the names of the primary and contingent beneficiaries.

18. Retirement benefits, such as employer plans and/or IRAs, for both clients should be listed, including the names of the primary and contingent beneficiaries.