

ACUÑA & CASAS, P.C.

ESTATE PLANNING INFORMATION

NOTE: PLEASE PRINT COMPLETE LEGAL NAMES AS YOU WANT THEM TO APPEAR IN YOUR ESTATE PLANNING DOCUMENTS.

1. Husband _____ Birthdate _____ SS# _____

2. Wife _____ Birthdate _____ SS# _____

3. Address _____ Phone _____

City _____ State _____ Zip Code _____

4. CHILDREN (First Name, Middle Initial, Last Name):

Child #1 _____ Birthdate _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Child #2 _____ Birthdate _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Child #3 _____ Birthdate _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Child #4 _____ Birthdate _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

5. FINANCIAL AGENTS (Trustee/Executors)

Agent #1 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Agent #2 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Agent #3 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

6. HEALTH AGENTS

HUSBAND'S

Husband's Health Agent #1 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Husband's Health Agent #2 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Husband's Health Agent #3 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

WIFE'S

Wife's Health Agent #1 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Wife's Health Agent #2 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Wife's Health Agent #3 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

7. GUARDIANS (only for children under 18 years of age)

Guardian #1 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Guardian #2 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

Guardian #3 _____

Address _____ Phone _____

City _____ State _____ Zip Code _____

DON'T FORGET . . .

_____ Statements for all your assets

_____ Addresses for all real estate