



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

Estate Planning Organizer

This information is held in strict confidence and will not be released without the client's permission.

Please complete the Estate Planning Organizer before your appointment as best you are able. Call 813-739-8915 if you have questions before your appointment. Please Print.

Date _____

YOU:

Name: _____
Street: _____
City/State/Zip: _____

Home Phone: _____
Other Phone: _____

Email: _____

Age: _____
Full time Florida resident? YES NO

US Citizen? YES NO
Profession: _____

Married _____ How long? _____
Single _____
Divorced _____ When? _____
Widowed _____ When? _____

First Marriage? _____
If not, is previous spouse alive? _____

If married, do you have a marital agreement?

If so, please bring a copy to the appointment.

Do you have any wills or trusts? _____
If yes, please bring copies to the appointment.

SPOUSE (if living):

Name: _____
Street: _____
City/State/Zip: _____

Home Phone: _____
Other Phone: _____

Email: _____

Age: _____
Full time Florida resident? YES NO

US Citizen? YES NO
Profession: _____

Married _____ How long? _____
Single _____
Divorced _____ When? _____
Widowed _____ When? _____

First Marriage? _____
If not, is previous spouse alive? _____

If married, do you have a marital agreement?

If so, please bring a copy to the appointment.

Do you have any wills or trusts? _____
If yes, please bring copies to the appointment.



THE LAW OFFICE OF

BRIAN P. BUCHERT, P.A.

CHILDREN AND OTHER BENEFICIARIES:

Please list all beneficiaries. Name ALL of your natural and adopted children even if they will not receive any part of the estate. If you do not have children include all who would inherit your estate if you died without a will, even if they will receive nothing from you.

1. Name: _____
Age: _____ Relationship: _____
Parent: _____

2. Name: _____
Age: _____ Relationship: _____
Parent: _____

3. Name: _____
Age: _____ Relationship: _____
Parent: _____

4. Name: _____
Age: _____ Relationship: _____
Parent: _____

5. Name: _____
Age: _____ Relationship: _____
Parent: _____

6. Name: _____
Age: _____ Relationship: _____
Parent: _____

Do you anticipate any additional children? _____

Do any of the beneficiaries have disabilities or special needs? _____
_____.



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

YOUR PLANS BEFORE DEATH:

Do you live: Alone? _____ As a married couple? _____

Who else lives in your household? _____

Do you plan to make significant gifts to individuals *before* your death? _____

_____.

Do you plan to make significant gifts to charities *before* your death? _____

_____.

Have you made gifts to any person in excess of \$12,000.00 in any calendar year? _____

If so, who? _____

When? _____ How Much? _____

Do you anticipate an inheritance? _____

From whom? _____ When? _____

How much? _____

Are you a beneficiary of a trust created by another? _____

Present Benefits: _____

Future Benefits: _____

Do you have long term health insurance? _____

Do you have these documents:

Durable Power of Attorney? _____

Living Wills? _____

Health Care Surrogate? _____

Pre-need Guardian? _____

If so, Please bring them to the appointment.



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

YOUR ESTATE AFTER YOUR DEATH:

How would you like to distribute your estate after your death? _____

_____.

If any beneficiary dies *before* you (and your spouse) do you want the beneficiary's children to inherit the beneficiary's share? (For example, if your child dies do you want his or her child to inherit that share of the estate?) _____

Do you wish to disinherit anyone? _____

Who? _____

Their relationship to you: _____

Who will administer your estate or trust after your death? _____

What is the administrator's relationship to you? _____

Where does the administrator live? _____

Alternate administrator if needed: _____

What is the alternative administrator's relationship to you?

Where does the alternative administrator live?

If you have dependents, who will be the guardian if necessary?

What is the guardian's relationship to you? _____

Alternative guardian if needed: _____

What is the alternative guardian's relationship to you?

Are you concerned about estate taxes at your death? _____

What are your other concerns, estate planning and otherwise? _____



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

ASSETS:

You may provide a financial statement in lieu of this form. Be sure to note any accounts in joint names with others, or with a pay on death provision, in trust for status, or beneficiary designation. The accounts will not be governed by your will or trust.

Residence/Home:

Value: _____ Owner(s): _____

Other Real Estate:

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____
4. Describe: _____
Value: _____ Owner(s): _____
5. Describe: _____
Value: _____ Owner(s): _____

Cash and Cash Equivalents Such as Brokerage Accounts:

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____
4. Describe: _____
Value: _____ Owner(s): _____
5. Describe: _____
Value: _____ Owner(s): _____



THE LAW OFFICE OF

BRIAN P. BUCHERT, P.A.

IRA or Other Retirement Accounts:

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____
4. Describe: _____
Value: _____ Owner(s): _____

Closely Held Corporation, Limited Liability Company or Partnership:

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____

Notes, Mortgages and Obligations Payable to You:

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____

Personal Property (car, boat, motorcycle, antiques, etc.):

1. Describe: _____
Value: _____ Owner(s): _____
2. Describe: _____
Value: _____ Owner(s): _____
3. Describe: _____
Value: _____ Owner(s): _____



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

4. Describe: _____
Value: _____ Owner(s): _____

5. Describe: _____
Value: _____ Owner(s): _____

6. Describe: _____
Value: _____ Owner(s): _____

Debts:

1. Describe: _____
Amount: _____ Owner(s): _____

2. Describe: _____
Amount: _____ Owner(s): _____

3. Describe: _____
Amount: _____ Owner(s): _____

4. Describe: _____
Amount: _____ Owner(s): _____

Life Insurance:

1. On whose life? _____ Face Amount: _____
Cash Value: _____ Owner: _____
Beneficiary: _____

2. On whose life? _____ Face Amount: _____
Cash Value: _____ Owner: _____
Beneficiary: _____

3. On whose life? _____ Face Amount: _____
Cash Value: _____ Owner: _____
Beneficiary: _____

Do you have any assets, such as an annuity contract, which will pay income to your beneficiaries after your death? _____
_____.

Other Assets: _____

_____.



THE LAW OFFICE OF
BRIAN P. BUCHERT, P.A.

PROTECTING YOUR ESTATE:

Are you dependent upon anyone for care, transportation or other support? _____

Who? _____

What is their relationship to you? _____

Do you make your own health care decisions or does someone assist you?

Do you have complete control of your assets or does another person assist you?

Do you pay your own bills? _____

Do you fear anyone may attempt to steal or mishandle your assets before your death? _____

Who? _____

Do you fear anyone may attempt to contest your estate plan? _____

Who? _____

Do you need protection for any person? _____

Who? _____

Will you drive yourself to the lawyer's office or will another person provide transportation?

Who? _____

Has anyone exerted any pressure on you to give them gifts either before death or at your death?

Who? _____

Have you made previous wills or trusts? _____ If so, please bring copies to the appointment.

During the last twenty years have you changed the beneficiaries in your will or trust? _____ If so, please explain in your interview.

Have you told anyone you intended to make a gift to them in your will or trust and now have changed your mind about making that gift? _____

Has anyone told you they expect you to leave them an inheritance? _____

Do you intend to give anyone a gift of inheritance by giving them insurance policy proceeds or a like gift, rather than a gift in your will or trust? _____

Have you given anyone their inheritance while you are alive rather than giving it to them at your death?



THE LAW OFFICE OF

BRIAN P. BUCHERT, P.A.

Are the step-children who may expect an inheritance? _____

If you are single, do you have prospects for marrying? _____

Do you have trusted financial advisors? _____ If so, do they become involved in your estate planning decisions? _____

Have you ever been tested for Alzheimer's Disease? _____

Have you been seriously ill in the last five years? _____

Has your competence every been questioned in any legal proceeding? _____

Do you have any legal judgments against you? _____

Is there anything else you would like your lawyer to know? _____
