

## CLIENT WORKSHEET

A person has the ability, in their last will and testament, to not only orchestrate the tax efficient transfer of their assets but also to express and reflect their values, parenting styles and charitable interests. As we move forward with this discussion, there will be a few “players” that need to be identified. This worksheet will help prepare you to for your visit with the attorney you are working with.

### POWER OF ATTORNEY

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

### MEDICAL POWERS OF ATTORNEY (NAME/ADDRESS/PHONE)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

### EXECUTOR(S)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

### GUARDIANS:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

### TRUSTEES OF \_\_\_\_\_

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

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- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

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- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_