

Estate Plan Summary Worksheet

Client(s):	Matter number:	Attorney:	Date:
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Estate Plan Codes (see Document Codes):

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ESTATE PLAN SUMMARY

Summary:

Estimated Net Worth:
Children (include birthdates):
Trustees:
Personal Representatives:
Attorneys-in-Fact:
Health Care Agents:
Specific Bequests/Other:

Potential issues or areas for follow up and further discussion:

CALENDAR ITEMS

Docket follow up letter / estate plan review?

<input type="checkbox"/> 1 year	<input type="checkbox"/> 3 years	<input type="checkbox"/> 5 years	<input type="checkbox"/> Other _____	<input type="checkbox"/> None
(Specify)				

Docket other issues?

<input type="checkbox"/> 1 month	<input type="checkbox"/> 3 months	<input type="checkbox"/> _____	<input type="checkbox"/> None
(Specify)			
Reason:			

Gifting?

<input type="checkbox"/> Crummey letters:	<input type="checkbox"/> Firm to prepare	<input type="checkbox"/> Firm will not prepare	<input type="checkbox"/> Diary annual reminder on _____ for ___ yrs
<input type="checkbox"/> Gift tax return:	<input type="checkbox"/> Firm to prepare, diary reminders on 4/15/___ and _____	<input type="checkbox"/> CPA to prepare, send reminder on _____	
<input type="checkbox"/> Other:			

Document Codes

Wills

- 101 Simple Will—No Trusts/Pourover
- 102 Simple Will—Contingent Trusts
- 103 Disclaimer Will
- 104 Marital Will, No GST Exemption
- 105 Marital Will, GST Exemption
- 106 Codicil

Revocable Trusts

- 201 Revocable Trust Agreement, No GST Exemption
- 202 Revocable Trust Agreement, GST Exemption
- 203 Revocable Trust Agreement, Disclaimer
- 204 Joint Revocable Trust (only use if no other option)
- 205 Trust Amendment or Restatement
- 206 Trust Revocation

Irrevocable Trusts

- 301 Crummey Trust, One Beneficiary
- 302 ILIT for Descendants Only, No GST Exemption
- 303 ILIT for Descendants Only, GST Exemption
- 304 ILIT for Spouse & Descendants, No GST Exemption
- 305 ILIT for Spouse & Descendants, GST Exemption
- 306 Supplemental Needs Trust
- 307 Special Needs Trust
- 308 Qualified Personal Residence Trust
- 309 Grantor Retained Annuity Trust with Marital Deduction
- 310 Grantor Retained Annuity Trust without Marital Deduction
- 311 Medicaid Trust
- 312 Cabin Trust
- 313 Misc Trust

Charitable Trusts

- 401 Charitable Remainder Unitrust
- 402 Charitable Remainder Annuity Trust
- 403 Charitable Lead Unitrust
- 404 Charitable Lead Annuity Trust
- 405 Private Foundation Corporation
- 406 Private Foundation Trust

Other

- 501 Statutory Short Form Power of Attorney
- 502 Common Law Power of Attorney
- 503 Revocation of Power of Attorney
- 504 Health Care Directive
- 505 Limited Liability Company
- 506 Limited Partnership (or a variation)
- 507 S-Corporation
- 508 C-Corporation
- 599 Miscellaneous Documents