



THE BOWERS

L A W F I R M L L C

PERSONAL INFORMATION FOR ESTATE PLANNING

Husband

Full Name: _____

Work Phone: _____

Home phone: _____

Cell Phone: _____

Email: _____

County of Residence: _____

Citizenship: _____

Residence Address:

Mailing Address: (If different from Residence)

Wife:

Full Name: _____

Maiden Name: _____

Work Phone: _____

Home phone: _____

Cell Phone: _____

Email: _____

County of Residence: _____

Citizenship: _____

Residence Address:

Mailing Address: (If different from Residence)

have different choices for your backup or alternate Executor, please indicate which alternate is for which spouse.

Executor (Normally your spouse): _____
Alternate Executor: _____
Second Alternate: _____

2. **TRUSTEE OF TRUST FOR CHILDREN AND OTHER DESCENDANTS.** The Trustee is responsible for managing any assets going to your minor children until they reach a certain age. It is a good idea, if you have suitable candidates, to have an alternate or two in the event your primary choice is unable to act as Trustee.

Trustee: _____
Alternate Trustee: _____
Second Alternate: _____

3. **FINANCIAL MATTERS POWER OF ATTORNEY.** A financial power of attorney allows you to name an agent who can act for you in a broad range of financial areas. This can be a useful tool for couples should one of you be unavailable or incapacitated. Typically, you will name your spouse as agent, but you can name any person that you choose. You can also name alternates or backups if you so choose.

Financial Matters Agent: _____
First Alternate: _____
Second Alternate: _____

4. **GUARDIAN.** The Guardian is the person(s) responsible for the welfare and care of your minor children should something happen to both parents. It is a good idea to name backups or alternates if you have suitable candidates.

Guardian(s): _____
First Alternate(s): _____
Second Alternate(s): _____

PLAN OF DISTRIBUTION

1. **SPECIFIC GIFTS.** Do you want to make any gifts to a charity? Do you wish to make any special gifts to particular persons? You can make specific gifts in your will or you can leave a list of instructions for your Executor. Gifts made in your will are more binding, but a list of instructions is more flexible.

2. **AGE OF DISTRIBUTION.** If you establish a trust to allow a third party to manage assets for beneficiaries, when do you think the beneficiaries will be mature enough to manage assets on their own? The usual age we select is twenty one, but if you have an age that you feel is more appropriate for your beneficiaries please state below.

3. **ULTIMATE DISTRIBUTION.** If you, your spouse, your children, and all other beneficiaries named fail to survive you, to whom do you want to leave your estates? You might consider a charity, your church, your heirs or particular relatives.

GEORGIA ADVANCE HEALTHCARE DIRECTIVE

The Georgia Advance Healthcare Directive is really three documents in one.

First, it is a healthcare power of attorney which enables you to name a healthcare agent and backups to make healthcare decisions for you should you be unable to do so for yourself.

Second, it is a living will whereby you can state ahead of time your treatment preferences should you be in a terminal condition or permanently unconscious. This can be a mechanism for you to remove that decision making burden and potential controversy from your family.

Third, it is a guardianship nomination which allows you to state your preference for who your guardian would be should a court ever determine that you needed a guardian.

Attached is a sample directive for you to review. Please state below your preference for healthcare agent and backups if any in order of preference.
