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Welcome, and thanks for your inquiry about Estate Planning. We can provide both couples and singles with individual documents such as a Last Will & Testament or Power of Attorney, but our best value is a standard estate plan package which includes five (5) key documents, a *Last Will & Testament*, *Health Care Power of Attorney*, *Living Will*, *Financial Power of Attorney*, and *Final Instructions Letter* for each client.

Additional items such as a Revocable Trust, a survivorship deed, or transfer on death affidavits for real estate and vehicles are also available.

This list identifies the key information this office needs to prepare a thorough plan for you:

Information Needed for Estate Plan

1. Your full legal name, residence address, County in which you reside, date of birth, social security number and Ohio driver's license or official State photo ID number.
2. Your spouse's full legal name, date of birth, social security number and Ohio driver's license number (if applicable).
3. Names and full addresses of all persons to be named in the Will as recipients and their relationship to you (child, sibling, friend, etc.).
4. Names, full addresses, and phone numbers of two (2) persons to nominate as Executor of your Will.
5. Names, addresses and phone numbers of two (2) or three (3) trusted persons to name in your Living Will, Health Care Power of Attorney, and Financial Power of Attorney documents.
6. Names, full addresses and phone numbers of two (2) persons to be named as legal guardians for any minor children (if applicable).
7. List of any specific items to be left to specific people – jewelry, collectibles, etc., and the full names of those persons and their relationship to you (child, sibling, friend etc.).
8. List of all real estate owned (amount of any mortgages and bank info). Please provide a copy of your Deed if you have it.



9. List of all life insurance policies, bank accounts, stock brokerage accounts, other investment accounts. Names of any beneficiaries designated on life policies or on any accounts that call for beneficiary designations.
10. Pre-need arrangement information, company name, account number and company contact information. The location of the facility and/or burial information and location.
11. Your preferences regarding cremation and/or traditional burial.
12. Your preferences regarding organ donation.

END