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New Jersey Estate Planning Basic Fact Sheet (All clients must fill out)

The goal of a Will, Living Trust or a Will with Children's Trust is to provide an orderly plan for effective transfer and management of estate for the beneficiaries. A basic Will is to transfer the entire estate to the other spouse when testator passes away, when both spouse pass away to transfer the entire estate to children or to the Children's Trust if they are still minors. Living Trusts including but not limited to Revocable or Irrevocable Trusts, etc. Attorney will discuss further with you in the meeting to be scheduled.

Husband's Name: (Full Legal Name) _____

Wife's Name: (Full Legal Name) _____

Residence: _____ (City or Town) _____

Zip Code: _____ In the County of _____ Home Phone: _____

Cell Phone: _____ (H) Employer: _____ (H) Work Phone: _____ (H)

E-mail Address: _____ (H)

Cell Phone: _____ (W) Employer: _____ (W) Work Phone: _____ (W)

E-mail Address: _____ (W)

Beneficiaries : (Children) DOB and Age:

	Original	Successor
Executor:	(H) _____	(H) _____

(H) stands for the husband's choice (W) stands for Wife's choice.

	(W) _____	(W) _____
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Trustee for	(H) _____	(H) _____
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Children's	(W) _____	(W) _____
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Trust.

(Children's Trust only come into effect when both husband and wife are not there.)

Guardian for

Minor

Children. _____

Legal Guardian for children come into effect if the children are minor and if both husband and wife are not there.

ARE THERE ANY PRENUPTIAL AGREEMENTS? OR IF EITHER SPOUSE HAS BEEN DIVORCED, WE NEED COPIES OF ALL SUCH AGREEMENT OR DIVORCE JUDGMENT.

Note: There are three types of properties in an estate: (1) Probate Estate. (a) Assets held in the sole name of testator. (b) Assets held as tenant in common without right of survivorship. (c) Assets payable to the client's estate upon death. (2) Contract Estate (non-Probate) life insurance policy, pension plan which client named beneficiary by contract. (3) Joint Ownership Estate assets held "with right of survivorship".