

The Wisdom Firm LLC

ATTORNEYS AT LAW

LITIGATION REAL ESTATE CIVIL RIGHTS BUSINESS LAW

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LICENSED IN ALABAMA &
TEXAS

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ESTATE PLANNING INFORMATION

FULL LEGAL NAME: _____

WHAT WAS YOUR MAIDEN NAME: _____

CURRENT ADDRESS: _____

CURRENT TELEPHONE NUMBER: _____

EMAIL ADDRESS: _____

EMPLOYER: _____

MARITAL STATUS: _____

SPOUSE'S NAME: _____

ANY OTHER NAMES YOUR SPOUSE IS KNOWN BY: _____

NUMBER OF CHILDREN: _____

FULL NAMES AND DATE OF BIRTH OF EACH CHILD: _____

<u>CHILD'S NAME</u>	<u>DATE OF BIRTH</u>	<u>PLACE OF RESIDENCE</u>
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_____	_____	_____
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**NAME AND ADDRESS OF THE PERSON OR PERSONS YOU WISH TO BE
GUARDIAN(S) OF YOUR MINOR CHILDREN:** _____

**NAME AND ADDRESS OF THE PERSON OR PERSONS YOU WISH TO BE
TRUSTEES FOR YOUR MINOR CHILDREN:** _____

**DO YOU HAVE GRANDCHILDREN THAT YOU WILL SPECIFICALLY
PROVIDE FOR IN YOUR ESTATE? IF SO, PLEASE LIST THEIR NAME AND
DATE OF BIRTH:**

**NAME OF PERSONAL REPRESENTATIVE FOR YOUR ESTATE – please
also list the relationship to you, their address and date of birth:**

**NAME OF ALTERNATE PERSONAL REPRESENTATIVE – (please list the
relationship to you, their address and date of birth):**

**NAME AND ADDRESS OF YOUR POWER OF ATTORNEY FOR FINANCIAL
AFFAIRS:**



NAME AND ADDRESS OF ALTERNATE POWER OF ATTORNEY: _____

NAME AND ADDRESS OF HEALTH CARE PROXY: _____

NAME AND ADDRESS OF ALTERNATE HEALTH CARE PROXY: _____

NAME AND ADDRESS OF SECOND ALTERNATE HEALTH CARE PROXY: _____

PLEASE SET OUT BELOW ANY SPECIFIC BEQUESTS OR WISHES YOU MAY HAVE REGARDING YOUR ESTATE. INCLUDING, BUT NOT LIMITED TO ANY CHARITABLE BEQUESTS.

PLEASE NAME ANY PERSON OR PERSONS YOU WISH TO DISINHERIT:

ANY FURTHER WISHES OR INFORMATION YOU MAY DESIRE TO INCLUDE:

