

SAPIRO GOTTLIEB & KROLL

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Of Counsel

David M. Sapiro†

BASIC ESTATE PLAN INFORMATION FORM

NAME : _____

ADDRESS: : _____

: _____

: _____

Home Phone Number: _____

Work Phone Number: _____

Cell Phone Number: _____

e-mail address: _____

1. Husband's name: _____
(as written on birth certificate, social security card and license etc.)

Address: _____

Home phone: _____

Cell phone: _____

Work phone: _____

E-mail: _____

2. Wife's name: _____
(as written on birth certificate, social security card and license)

Address: _____

Home phone: _____

Cell phone: _____

Work phone: _____

E-mail: _____

3. Children's names:
(as written on birth certificates, social security cards and/or licenses)

_____	_____
Child's Name	Date of Birth

_____	_____
Child's Name	Date of Birth

_____	_____
Child's Name	Date of Birth

_____	_____
Child's Name	Date of Birth

4. Who will be the Guardian of any children who have not attained the age of majority if you and your spouse do not survive:

Name of Guardian

5. If the above Guardian shall fail to qualify for any reason as the Guardian, or having qualified shall die, resign or cease to act for any reason as the Guardians, your alternate Guardian will be:

Name of Alternate Guardian (Optional)

6. Executor of Last Will and Testament (the person who will carry out the instructions of the Will):

Name of Executor

7. If the above Executor shall fail to qualify for any reason as the Executor, or having qualified shall die, resign or cease to act for any reason as the Executor your alternate Guardian will be:

Any other information you think we should know about to prepare your estate plan:

