

LAW OFFICE OF CONRAD WILLKOMM, P.A.

3201 North Tamiami Trail, Second Floor

Naples, Florida 34103

(239) 262-5303

Facsimile (239) 262-6030

conrad@swfloridalaw.com

www.swfloridalaw.com

MARRIED PRELIMINARY INFORMATION

Last Name: _____ Spouse Last Name: _____

First Name: _____ Spouse First Name: _____

Middle: _____ JR., SR. II, III, IV? Middle: _____ JR., SR. II, III, IV?

I prefer to be called: _____ I prefer to be called: _____

Date of Birth: _____ Date of Birth: _____

Social Security #: _____ Social Security #: _____

Occupation: _____ Occupation: _____

Home Address: _____

Home City: _____ Home State: _____ Home Zip: _____

County of Residence: _____ Home Phone: _____

Cell Phone: _____ Spouse's Cell Phone: _____

E-Mail Address: _____

CHILDREN

(Date of Birth)

(# of Children)

1. _____

2. _____

3. _____

4. _____

If you have additional children, please give the above information on a separate sheet of paper.

Is this the Husband and Wife's first marriage? ___ Yes ___ No. Are any children from a prior relationship? ___ Yes ___ No

If yes, please indicate who is the parent of each. _____

Is it possible for the Husband and Wife to have or adopt more children? ___ Yes ___ No

Do any of the children have mental or health related impairments/disabilities? ___ Yes ___ No. If so, please describe:

Are you concerned with any of your children wasting their inheritance? ___ Yes ___ No

Are you concerned about the spouse of your children receiving any of their inheritance? ___ Yes ___ No

Are the Husband and Wife US citizens? Husband: ___ Yes ___ No Wife: ___ Yes ___ No

Do you have a pre/postnuptial agreement in effect? ___ Yes ___ No

What topics would you like to discuss at your appointment?

ASSET INFORMATION

APPROXIMATE VALUE

Life Insurance on Husband	_____	Life Insurance on Wife	_____
Husband's IRAs, 401(k)'s, Profit Sharing, etc.	_____	Wife's IRAs, 401(k)'s, Profit Sharing, etc.	_____
Residence	_____	Other Real Estate	_____
Stocks, Bonds, Mutual Funds	_____	Cash, CD's Savings, Checking	_____
Notes Where People Owe You Money	_____	Business Interests	_____
Cars, Jewelry, Furniture, etc.	_____	Expected Inheritance	_____
		Approximate total estate value	_____

DISPOSITION OF PROPERTY

Do you want all of your estate to go to your spouse if he/she survives you? ___ Yes ___ No.

Will someone other than your spouse or child receive a portion of your estate?

Name	Relationship
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

Upon the death of the surviving spouse, briefly describe how the balance of the estate to pass? _____

WHOM DO YOU WANT TO NAME AS THE PERSONAL REPRESENTATIVE/TRUSTEE OF YOUR ESTATE?
(Spouses normally name each other first.) ***Named Personal Representative(s) must either be a relative or Florida resident to qualify.

HUSBAND

Name	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

WIFE

Name	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

Whom do you want to name as guardian(s) of your children (if applicable)? (Married couples can serve together)

Name	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

Please note that original Wills are required for probate. Safety deposit boxes are difficult to access after death. We can keep the originals in our fire safe for no additional fee. Would you like us to hold your original Will and Trust? ___ Yes ___ No.

Please note one copy of your estate plan is included, would you like additional copies? If yes, please complete below:

___ Yes, please provide me with ___ additional copies for \$10 per copy.

___ Yes, please provide me with a flash drive containing a digital copy of my documents for \$25.

POWER OF ATTORNEY

Whom do you want to name as agent on your durable power of attorney? (Spouses normally name each other first. This power of attorney gives the person or persons you name the power to sign your name if you are not able to do so. For instance, it can be used to sign a check or a tax return.)

Husband

Wife

- | | |
|-------------------------------------|-------------------------------------|
| 1. _____
Address: _____
_____ | 1. _____
Address: _____
_____ |
| 2. _____
Address: _____
_____ | 2. _____
Address: _____
_____ |
| 3. _____
Address: _____
_____ | 3. _____
Address: _____
_____ |

HEALTH CARE SURROGATE

Whom do you want to name as agent on your health care surrogate? (Spouses normally name each other first. This document allows you to appoint someone to make medical decisions on your behalf should you become incapacitated)

Husband

Wife

- | | |
|---|---|
| 1. _____
Address: _____

Phone: _____ | 1. _____
Address: _____

Phone: _____ |
| 2. _____
Address: _____

Phone: _____ | 2. _____
Address: _____

Phone: _____ |
| 3. _____
Address: _____

Phone: _____ | 3. _____
Address: _____

Phone: _____ |

Would you like to have a Living Will incorporated into your Health Care Surrogate? _____ Yes _____ No. (This is a document where you declare that you would like life support withheld, if you have no medical chance of recovery.)

Would you like a laminated Health Care Surrogate wallet card for \$75 (includes 2 for each spouse)? _____ Yes _____ No.

LAW OFFICE OF CONRAD WILLKOMM, P.A.

3201 North Tamiami Trail, Second Floor; Naples, Florida 34103

(239) 262-5303

conrad@willkommlaw.com

www.willkommlaw.com

ESTATE PLANNING RATE SHEET

- SINGLE PERSON WILL PACKAGE	\$450.00
○ Last Will & Testament	
○ Durable Power of Attorney	
○ Designation of Health Care Surrogate	
○ Living Will	
○ HIPAA Release	
- MARRIED COUPLE WILL PACKAGE	\$950.00
○ Last Will & Testament (1 for Husband & 1 for Wife)	
○ Durable Power of Attorney (1 for Husband & 1 for Wife)	
○ Designation of Health Care Surrogate (1 for Husband & 1 for Wife)	
○ Living Will (1 for Husband & 1 for Wife)	
○ HIPAA Release (1 for Husband & 1 for Wife)	
- SINGLE PERSON TRUST PACKAGE*	\$850.00
○ Standard Revocable Trust	
○ Last Will & Testament	
○ Certification of Trust	
○ Deed transferring 1 property to Trust**	
○ Durable Power of Attorney	
○ Designation of Health Care Surrogate	
○ Living Will	
○ HIPAA Release	
- MARRIED COUPLE JOINT TRUST PACKAGE*	\$1,350.00
○ Standard Joint Revocable Trust	
○ Last Will & Testament (1 for Husband & 1 for Wife)	
○ Certification of Trust	
○ Deed transferring 1 property to Trust**	
○ Durable Power of Attorney (1 for Husband & 1 for Wife)	
○ Designation of Health Care Surrogate (1 for Husband & 1 for Wife)	
○ Living Will (1 for Husband & 1 for Wife)	
○ HIPAA Release (1 for Husband & 1 for Wife)	
- INDIVIDUAL DOCUMENTS	
○ Durable Power of Attorney	\$125.00
○ Living Will & Health Care Surrogate	\$125.00
○ Last Will & Testament	\$250.00
○ Standard Revocable Trust	\$650.00
○ Standard Joint Revocable Trust	\$900.00
○ Bypass/Marital/A B/QTIP Trust	\$900.00
○ Joint Bypass/Marital/A B/QTIP Trust	\$1,500.00
- MISCELLANEOUS ADDONS*	
○ Special Needs Trust	+ \$250.00
○ Separate Share/Dynasty Trust	+ \$250.00
○ Generation Skipping Share Trust	+ \$250.00
○ Conditional Homestead Waiver	+ \$350.00
○ Husband and Wife Non-revoke Agreement	+ \$450.00
○ Real Estate Subtrust/Life Estate Specific Bequest	+ \$250.00
○ Trust Flow Chart	+ \$300.00
○ Additional Deed transferring property to Trust**	+ \$ 75.00

*All revocable trusts include contingent trusts for minors and retirement benefit trusts at no additional charge.

** Price listed does not include applicable recording costs.