

BUCKLEY LAW

ANNUAL REVIEW WORKSHEET

The information requested on this worksheet helps me review your current situation.
Please complete all information thoroughly.

Your time investment in this worksheet ensures that your estate plan is allocated and/or funded properly.

Telephone Numbers: _____ Date _____

Home _____ Husband Work _____

Wife Work _____ Husband Cell _____ Wife Cell _____

HUSBAND

_____	_____	_____
<i>First</i>	<i>Middle</i>	<i>Last</i>
_____	_____	_____
<i>Date of Birth</i>		<i>Job Title</i>

	<i>Employer</i>	

WIFE

_____	_____	_____
<i>First</i>	<i>Middle</i>	<i>Last</i>
_____	_____	_____
<i>Date of Birth</i>		<i>Job Title</i>

	<i>Employer</i>	

Physical Address: _____
Street City State ZIP

Mailing Address (if different): _____

County of Residence: _____ Can we send you correspondence via e-mail? _____

E-mail Addresses: _____

For the things that matter.

GENERAL QUESTIONS/CONCERNS

If you answer yes to any of these questions, please give detailed changes.

Do you want to change any of your successor trustees? If yes, please clarify.

Do you want to change any of your distribution directions? If yes, please clarify.

Do you want to change any of your Agents under the Durable Power of Attorney? If yes, please clarify.

Do you want to change any of your Agents under the Healthcare Power of Attorney? If yes, please clarify.

Do you want to change any of your Personal Representatives? If yes, please clarify.

Do you want to change any of your guardians for your underage children (if applicable)? _____

If yes, please clarify. _____

Have any significant changes occurred to you or your heirs; i.e. births, divorces, deaths?

Do you have any other questions or concerns?
