

ESTATE PLANNING INFORMATION SHEET

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TODAY'S DATE: _____

Testator/Testatrix - Your Full Name, address, phone number and e-mail:

Full Name of Spouse, Children, Grandchildren or other Heirs that you intend to name in your Last Will and Testament:

Executor/Executrix: (Name of person(s) you wish to handle and administer your estate upon your death as well as backup(s) for said person(s) if they are unable to act)

Specific Bequests: (Do you have anything specifically, whether a piece of real estate or other assets, that you wish would be specifically distributed to an Heir or Heirs, entity or charity *before* any other assets are distributed in your estate - this can be a specific amount of funds or a percentage of your estate, real estate or other assets)?

Rest, Residue and Remainder of your Estate: (How do you wish for your estate in your name alone (how do you wish for your estate to be distributed to your heirs after any specific bequests are listed above are distributed first), for example, if you are leaving everything to your children, are they to inherit equally? For married couples, this is usually to your spouse first but if they have predeceased you, then how is your estate to be distributed? **(Also, consider that certain assets may have beneficiary designations that would fall outside the Will and not be included in the residue of your estate.)**)

If Heirs predecease: (If any of the above Heirs were to predecease you, would you wish that their share be spread equally among the remaining Heirs listed should the inheritance pass to that deceased Heir's children or heirs)

Trustee(s): (Do you wish to appoint any Trustee(s) under your Will to manage any of the assets of your Heirs or if any of your Heirs are minors at the time they receive an inheritance, who do you want to be the Trustee(s) of their share of your estate and at what age can the Heir receive the balance of the inheritance)

Guardian(s) for Children/Others: Who do you wish to nominate as Guardian of your minor (or) disabled children (or) other individual(s) for whom you are currently a Court appointed legal Guardian:

Memorandum: Are there any personal items you wish to leave specifically to an individual to be listed in a Memorandum with but not part of your Last Will and Testament?

DURABLE POWER OF ATTORNEY: Mainly financial but also has Medical Powers. Think about who you want to handle your financial affairs if you or your spouse (if you are married) cannot on your own behalf.

MEDICAL POWER OF ATTORNEY – LIVING WILL: Who do you want to make medical decisions for you if you cannot make them yourself and you are incapacitated. Think about who you want as a back-up to handle medical decisions such as consenting to treatment, procedures, medications, access to medical records if you or your spouse (if you are married) cannot act.

THE LIVING WILL: If you cannot speak for yourself, other than your spouse (if you are married) do you want making decisions that cover end of life decision making powers only, if you are in an end stage, irreversible medical condition with no hope for recovery or in a state of permanent unconsciousness, permanent brain disease or brain damage. Do you want to be made comfortable and pain free or do you still want extraordinary medical measures to take place such as an artificial nutrition (feeding tube) and hydration, artificial respiration, resuscitation, etc.

Call to schedule your appointment with:
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