

# **ESTATE PLANNING WORKSHEET**

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**PHILIP J. BRYCE, P.C.**  
Estate and Trust Planning

USING THIS ORGANIZER WILL ASSIST US IN DESIGNING AN ESTATE PLAN THAT MEETS YOUR GOALS.  
ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

IF POSSIBLE, PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE PRIOR TO YOUR  
APPOINTMENT VIA MAIL OR FAX.

**PHILIP J. BRYCE, P.C.** ♦ 212 S. Peters Road, Suite 101, Knoxville, Tennessee 37923  
Phone: (865) 690-5566 ♦ Fax: (865) 690-4967