

**LANE & RUSU CO., L.P.A.  
ESTATE PLANNING WORKSHEET**

The information requested on this worksheet may seem like *none of an attorney's business*, but it is very important that an estate planning attorney understands your present situation and your wishes for the future. This information enables us to plan the estate to accomplish future goals and to save on taxes and administrative expenses.

If you are married and all information on this worksheet is identical for you and your spouse, complete only one worksheet. If information for each spouse differs, make a copy of this worksheet so each spouse has a separate one.

For those of you who are single, we apologize for phrasing everything based on husband and wife. This is for simplicity of the form only. To complete this worksheet, please fill in the wife's blanks if you are female and the husband's blanks if you are male.

Estate planning is very important for singles as well as couples. Plan of distribution for singles is not obvious and most or all assets will be probated since joint tenancy with a spouse is not an available method of avoiding probate.

Date: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**HUSBAND:** \_\_\_\_\_  
*First Middle Initial Last*  
\_\_\_\_\_  
*Date of Birth Social Security Number*

**WIFE:** \_\_\_\_\_  
*First Middle Initial Last*  
\_\_\_\_\_  
*Date of Birth Social Security Number*

\_\_\_\_\_  
*Street City State Zip*  
County \_\_\_\_\_

Marital Status:  Married  Divorced  
 Separated  Single (including widowed and not remarried)

What is your primary motivation for considering estate planning? (*Select one or more*)

- |  |  |
|--|--|
| <input type="checkbox"/> Probate Avoidance               | <input type="checkbox"/> Federal Estate Tax planning   |
| <input type="checkbox"/> Guardianship for Minor Children | (For estates approaching the \$1,000,000 range - Although tax credits increase incrementally allowing for transfer of up to 1,000,000, estates approaching \$1,000,000 should be analyzed for federal estate tax planning options since inflation, growth and other factors may create tax issues in these estates.) |
| <input type="checkbox"/> Business or Farm Planning       |  |
| <input type="checkbox"/> Other: _____                    |  |