

INFORMATION NEEDED FOR IMPLEMENTATION OF ESTATE PLAN

Name1 委託人1: _____ Name2 委託人2: _____

Document Title 信托名稱: _____

Address 地址: _____

Telephone 電話: _____ Status 婚姻現狀: Single 單身 Married 結婚

Children Name 孩子名: _____ & Birthday 生日: _____

Grandchildren Name 孫子名: _____ & Birthday 生日: _____

What is the approximate net value of your non-retirement community estate? 家庭綜合財產的淨值(除退休帳戶外) \$ _____

The approximate net value of the separate property of each spouse? 家庭成員的個別資產
Mr. \$ _____ Mrs. \$ _____ Children \$ _____

What is the approximate value of your combined retirement assets, such as IRA's, 401k's and pension plans? 退休帳戶的財產總值

Please specify any special disposition of tangible personal property (furniture, cars, jewelry, etc.) other than a standard clause leaving it all to the surviving spouse, if any, and then equally to the children. 備註(例如:指定具紀念性的物品給受益人); 一般情況下, 如果沒有特殊指示, 全部財產將留給配偶 或 平等的分配給小孩

Please give us the names of the people whom you would like to act as successor Executors and Trustees after you can no longer act, in order of preference.

(名單請以順位排列)

Successor1 繼承人1 _____ Successor2 繼承人2 _____

Executor1 遺囑執行人1 _____ Executors2 遺囑執行人2 _____

Trustee1 財產受託管理人1 _____ Trustees2 財產受託管理人2 _____

Please give us the names of Guardians of the Persons and of the Estates of minor children, in order of preference.

Guardian1 法定監護人 _____ for Child 小孩名 _____

Guardian2 法定監護人 _____ for Child 小孩名 _____

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At what age would you like your children to take their shares after the death of surviving spouse, if not outright? **繼承者幾歲可以全權領取繼承的財產**

AGE: _____

AGE: _____

Do you have any special bequests or desires such as direct gifts to grandchildren while children are alive or such as bequests to collateral relatives or charities? If so, please specify. **是否要捐贈遺產給慈善團體, 請列舉:**

How would you like your assets to be distributed upon your death if you had no surviving children or grandchildren? **如果沒有小孩或孫子, 請指示您的遺產歸屬**

The answers to this question are needed to determine which type of trust is most advisable for you. **請務必回答以下問題**

(a) Are you and your spouse both United States citizens? **委託人是否為美國公民**

(b) If the answer to question (a) is yes, would you like the trust (i) to be the most flexible for the surviving spouse by giving the surviving spouse the most possible control over the trust assets (disclaimer format) or (ii) to provide that the assets of the predeceased spouse are to be held in trust for the life of the surviving spouse with the balance remaining at the death of the surviving spouse to go to the beneficiaries named in the trust at the time of the death of the predeceased spouse (3 trust format)?

如果委託人全是美國公民, 您希望配偶的權力是: (i) 配偶有遺產管理權 (ii) 遺產管理歸屬於財產受託管理人(配偶可當受益人)

Whom would you like to name as your agent to make health care decisions for you if you are unable to do so, and in what order of priority?

請指示醫療保健決定權代理人(名單請以順位排列)

Agent1 代理人1: _____ Agent2 代理人2: _____

Agent3 代理人3: _____ Agent4 代理人4: _____

Whom would you like to name as your attorney-in-fact to sign on financial documents for you if you are incapacitated, and in what order of priority?

請指示財務簽名代理人(名單請以順位排列)

Attorney1 代理人1: _____ Attorney2 代理人2: _____

Attorney3 代理人3: _____ Attorney4 代理人4: _____

DOCUMENTS NEEDED FOR IMPLEMENTATION OF ESTATE PLAN

1. Please furnish us with the address, copy of the grant deed and copy of the property tax bill for each parcel of real property which you own. **請提供所有房屋稅的單據, 正確地址, 以及房契影本**
2. Please furnish us with a copy of a recent statement on each retirement and non-retirement brokerage account or mutual fund which you have. **請提供所有投資帳戶的月結單 (清楚註明退休及非退休帳戶)**
3. Please give us a list of any other assets, including business and/or partnership interests which you may have, including the name of the asset and how title is held.
請提供您所擁有的公司及合作投資項目的正確名稱 (清楚註明公司負責人名單)
4. For each life insurance policy, please give us the name of the insured, the name and address of the insurance company, the policy number and the face amount of the policy.
請提供所有保險公司的聯絡資料及保單合同明細 (清楚註明被保人的基本資料)

Please issue the check payable to **支票抬頭**: Mr. Richard Skolnick
In the amount of **金額**: \$680 Six Hundreds Eighty Dollars

Should you have any questions, please feel free to contact us at any time. **如有任何需要或疑問, 歡迎隨時與我們聯絡 (626)291-2200**