

Estate Planning Consultation

Amend Documents/Discuss Estate Planning



You've contacted us to amend or discuss your estate planning.

Now we can review your assets and what you want in your estate planning. Ownership of assets is important, whether you have a trust or a will. Awareness of how you own your assets is part of the process. We're at 781 863-8606, email Joel@jbernsteinlaw.com

4 Steps to Proceed

1. Input information then print. Or print & write.
2. US Mail form with \$425 check for legal fee.
3. Mail this form and check to 'Joel Bernstein, Attorney' to 33 Bedford Street, Suite 13, Lexington MA 02420
4. When this form with check arrives at the office, we will telephone you and arrange a Zoom meeting.

Our policy: After discussion we will write you and quote for any needed work. We'll receive payment before preparing documents.

Person1 name: Phone: Email:

Person2 name: Phone: Email:

Section 1: Asset ownership

<i>DESCRIPTION of non-retirement accounts</i>	<i>Account in SOLE Name of:</i>		<i>Account in JOINT ownership</i>		<i>Account in LIVING TRUST of:</i>	
	Person1	Person2			Person1	Person2
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	With non-spouse? <input type="checkbox"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
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REAL ESTATE (subtract mortgage)

SOLE
Name of:

JOINT
ownership

LIVING TRUST of:

Person1 Person2

Person1 Person2

With non-spouse?

With non-spouse?

With non-spouse?

RETIREMENT accounts/
LIFE Insurance

Account of:

BENEFICIARY NAME
Primary
Contingent (if Primary deceased)

Financial Institution Name

Person1 Person2

Primary

Contingent

Primary

Contingent

Primary

Contingent

Primary

Contingent

Section 2: Documents to change. Questions you have.

Which documents to change? ALL of them

Trust only Will only Health Care Proxy only Durable Power of Attorney only

CHANGE names of beneficiaries DEATH of person named in your documents?

Desired changes to estate planning/issues you have

Changes you want