ESTATE PLANNING INFORMATION

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Please indicate what type of client you are by choosing the answer that best describes your status. We should be able to provide covered legal benefits to those listed below. If you choose "Other," please briefly describe how you heard about us and who referred you to us so that we may determine if there is a possibility of a benefit or discount that may be available to you for these estate planning documents.

_____ I am an active San Antonio Police Officer;

_____ I am an active San Antonio Professional Firefighter;

_____ I am married to an active San Antonio Police Officer;

_____ I am married to an active San Antonio Professional Firefighter;

_____ I am a parent (or mother-in-law or father-in-law) of an active San Antonio Police Officer or Professional Firefighter;

_____ I am a retired San Antonio Police Officer; (date of retirement: _____)

_____ I am a retired San Antonio Professional Firefighter; (date of retirement: _____)

_____ I am married to a retired San Antonio Police Officer; (date of retirement: _____)

_____ I am married to a retired San Antonio Professional Firefighter; (date of retirement: _____)

_____ I am a widow of a deceased San Antonio Police Officer or Professional Firefighter who died while still active with SAPD or SAFD;

_____ Other: _____

If you are a parent (mother or father-in-law) of an active San Antonio Police Officer or Professional Firefighter, please state their name below and if they or police or fire.

Name: _____ _____ Police Officer _____ Professional Firefighter

*** Please print legibly or type ***

FULL AND LEGAL NAME: _____

LAST 4 DIGITS OF SSN: _____ DATE OF BIRTH: _____

ADDRESS, CITY, STATE, ZIP: _____

What is your main telephone number that we may contact you? (_____) _____

What is a secondary telephone number that we may contact you at? (_____) _____

What County do you reside in: _____ EMAIL ADDRESS: _____

If single, you may skip these questions below

If currently married, what is your spouse's name: _____

If currently married, what was the date of marriage: _____

If currently married, name the county, state and/or country you got married in. _____

INFORMATION ABOUT PRIOR MARRIAGES, IF ANY:

(If you have been married before, please furnish the following information as to each prior marriage below to disqualify such persons).

List below, name of your prior spouse(s):	Date and County of divorce or death:	Circle below:
(1) _____	_____	Divorce or Death
(2) _____	_____	Divorce or Death
(3) _____	_____	Divorce or Death
(4) _____	_____	Divorce or Death

INFORMATION ABOUT YOUR CHILDREN:

(Please list all children, including any children born from prior marriages and adopted children.)

(1) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(2) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(3) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(4) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(5) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(6) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(7) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

(8) CHILD'S FULL NAME:_____

DATE OF BIRTH:_____ PLACE OF BIRTH: _____

If child is married, name of spouse:_____

How many children (Your Grandchildren):_____

(If child is from a prior marriage or prior relationship, please indicate name of other parent): _____

If you have more children, please list them on a separate sheet of paper.

INFORMATION ABOUT ANY DISABLED CHILDREN:

(Please specify if any children or grandchildren have any special problems such as physical or mental disabilities.)

CHILD'S FULL NAME:_____
DATE OF BIRTH:_____ PLACE OF BIRTH: _____
What type of disability: _____
If child is married, name of spouse:_____
How many children (Your Grandchildren):_____

INFORMATION ABOUT ANY DECEASED CHILDREN:

If there are any deceased children, please list the name, date of birth, etc. of any children (your grandchildren) of deceased children.

CHILD'S FULL NAME:_____
DATE OF BIRTH: _____
DATE AND COUNTY OF DEATH: _____
Was child married, if so, name of spouse:_____
How many children (Your Grandchildren):_____

QUESTIONS FREQUENTLY ASKED ABOUT WILLS AND OTHER ESTATE PLANNING TOOLS:

Q. What happens if I die without a Will?

A. If a person dies without a Will, the court disposes of his or her property. The law provides for the orderly distribution of property at death to surviving heirs by degree of kinship. Dying without a Will may cause undesired results and unexpected costs and delays. Because a person usually has an idea how he or she would like his or her property to pass on to others, undesired results can occur if you die without a Will. For example, very often one spouse wants to leave everything to the surviving spouse who will provide for the children. If the deceased person, decedent, in this situation is survived by children from a previous marriage, those children share in the distribution of property whether or not the decedent desired such results.

Q. What can a Will do?

A. A Will is a legal instrument which states how property is to be distributed at death. A valid Will avoids many of the problems that may arise from dying without a Will and allows a person to leave property to whom he or she desires. A Will can also designate the individual who will manage the estate, the independent executor, and name a Guardian and Trustee for minor or incapacitated children.

Naming a guardian who is willing and able to take care of your children and naming a person who will manage the children's inheritance is extremely important. The only way to do this is through a Will. Otherwise, a Judge, who is not personally acquainted with the deceased's relatives or friends, decides who will care for the children and who will be in charge of their money and other property.

A valid Will can also set up a Trust, a method by which property is held by one party (the Trustee) for the benefit of another (the Beneficiary). A Trust is an effective way of managing property for the benefit of minor or incapacitated persons who are incapable of managing their own financial affairs. A Trust also is useful to prevent a spendthrift child from immediately spending his or her inheritance by preserving the funds for the child's education or other important needs. Further, a Trust may be used to protect the child's inheritance from the claims of his or her creditor because property placed in a Trust generally may not be reached by a creditor.

Q. What are probate assets?

A. Only property owned by the decedent at death can be disposed of by Will. These are called "probate assets." A Will cannot make a gift of "non-probate assets" -- assets which pass at death other than by Will or intestacy. The principal types of non-probate assets include property passing by contract, property passing by survivorship, and property held in trust.

Property passing by contract includes life insurance proceeds, IRAs, and employee benefit plan proceeds, such as the proceeds payable under a pension, profit-sharing, or employee retirement plan.

These assets pass outside the Will to the persons named by the decedent in the appropriate beneficiary designations. Thus, it is important to periodically review the beneficiary designations with respect to these types of assets and to update them as necessary.

Property held by the decedent and another person as joint tenants with right of survivorship passes outside the Will directly to the survivor. Survivorship assets typically include certain limited types of bank accounts or certificates of deposit and certain savings bonds issued by the United States Government, such as Series EE savings bonds.

Another category of property that passes outside of probate is property held in a trust for the benefit of the decedent. The trust may have been created by the decedent during his or her lifetime for property management purposes or by someone else, such as a parent of the decedent. Trust assets pass under the terms of the trust rather than under the terms of the deceased's Will.

It is important to determine the extent of one's nonprobate assets when planning the disposition of one's property at death. If a substantial portion of the assets would not pass under the Will, even a well-drafted Will may be insufficient to carry out the testator's intent in disposing of his or her property.

Q. What is community property and what is separate property?

A. Texas law -- somewhat awkwardly -- defines community property as that which is not separate property. Separate property is that which was owned by a spouse before the marriage, as well as property received after marriage by gift or inheritance. Everything else is community property. For example, the earnings of both spouses during marriage are community property. Income from separate property during marriage is also community property. When drafting your Will, you must consider what property you own outright and what property you own jointly with another.

Q. What is an Independent Executor?

A. An executor is the person appointed in your Will to be the primary representative of your estate. Because of a provision somewhat unique to Texas law, you can make your executor "independent." That is, the executor can act free of control by a court, except for only a few essential matters. Without this independence, virtually all of the executor's actions will be subject to prior approval by the court-- an obviously cumbersome and expensive procedure. Your executor will be responsible for administering your estate. This includes ascertaining your properties and your liabilities. He must prepare a list of your properties and submit them to the court. After debts have been paid (including estate and inheritance taxes), the executor gives his final accounting and makes distributions to the beneficiaries in your Will.

Please list below your choices of executors including one or more alternates. We recommend that you choose your spouse, if you are married, as the primary Executor. ***(Must be 18 years of age or over)***

List full name of Executor(s) below:

Executor: _____

Alternate Executor: _____

Second Alt. Exec.: _____

Q. Who will raise my minor children after my death? What is a Guardian?

A. The other parent. But if the other parent is not living, this becomes a selection you can make in your Will. If you fail to do so, the Court will make the choice for you. Needless to say, you should assume the responsibility of this important decision and not leave it up to a Judge.

Clients frequently tell us that they have chosen one of their parents as the Guardian in the event of both clients' deaths. A quick mathematical computation may shed light on the advisability of this choice. For example, assume that the youngest child of the client is three (3) years old and the client's parent is fifty-eight (58). When that child is fifteen (15) (i.e., during a time when parent-child communication can be difficult under the best of conditions), the grandparent will be seventy (70).Under these circumstances another choice may be better for your child. You should look first to your contemporaries in your families (such as brothers, sisters or cousins). If none are appropriate, then consider friends with children in the same age range as yours. If you have planned your estate properly, the guardian should not experience financial difficulty in raising your children. To accomplish this, we suggest that upon the death of you and your spouse, a trust be established for your minor children.

Please list below your choices for a Guardian and alternates. **We recommend an individual Guardian as opposed to joint Guardians.** Remember the guardian that you choose is someone other than you and the other parent.

Guardian: _____

1st Alternate Guardian: _____

2nd Alternate Guardian:_____

** A Declaration of Guardian for Minor Children in case of Death or Incapacity form will also be provided. The same guardians listed above will be named on this form.

Q. Who will I create a Trust for? What is a Trustee?

A. A Trustee is a person to whom property is transferred for the benefit of someone else (the beneficiary). A Trust arising out of a Will is called a "contingent testamentary trust," meaning the creation of the trust is contingent upon the death of the person and the beneficiaries being under the age specified in the Will. At that time, a Trust is created and the portion of the estate which you have designated to pass to the beneficiary will instead pass into the Trust for the benefit of the beneficiary.

The Trustee's duties are to manage the funds and to ensure that the beneficiary receives enough of the funds to pay for expenses such as reasonable and necessary health, education, maintenance and support. In addition, you may designate an age at which time the beneficiary is to receive the remainder of the funds held in Trust. We usually recommend that Trustees be given very broad and adaptable powers. The Trustee should be able to do what is best for the beneficiary, without being curbed by inappropriate restrictions. If a Trust appears suitable for your estate plan, you will want to be careful in your selection of a Trustee. Of course, the person you choose as Guardian of your children may be a person that you would find trustworthy to handle their money. The Trustee can be the same person as the Guardian and/or alternate Executor. Remember, the Trustee is someone other than you and the other parent.

Trustee: _____ 1st Alternate Trustee: _____

2nd Alternate Trustee: _____

At what age would you want the trust to terminate? **18**_____ ; **21**_____ ; **25**_____ ; or

_____ When he or she receives a 4-year college degree from an accredited college or university;

_____ When he or she joins the U.S. Military and serves at least four (4) years active duty and was not discharged with anything less than an honorable discharge; or

_____ Other: _____

LIVING TRUST INFORMATION:

Do you have a Living Trust? _____ yes _____ no

If so, please state the name and the date of the Trust:
_____ Date: _____

Are you a Trustee of the Living Trust? _____ yes _____ no

If not, who is named on the Trust: _____

Are you a Beneficiary of a Living Trust? _____ yes _____ no

If so, what are you expecting to receive? _____

NATIONAL FIREARMS ACT (NFA) CLASS III FIREARMS or WEAPONS INFORMATION:

Do you own any NFA Class III Firearms or Weapons? _____ yes _____ no

If you do own any Class III Firearms or Weapons, do you have a NFA Trust? _____ yes _____ no

What is the name of the NFA Trust? _____

What is the date of the NFA Trust? _____

PROPERTY INFORMATION:

Do you own any real estate ***within*** the state of Texas? If so, please list accordingly:

Property address:_____

Legal description (as described in your deed to the property, including volume and page number):

_____

- Do you own any real estate located ***outside*** of Texas? If so, please list accordingly:

Property address:_____

Legal description (as described in your deed to the property, including volume and page number):

_____

- Have you inherited or do you expect to inherit any property? If possible, describe and give approximate values:

_____

ESTATE VALUE:

Please indicate what your total gross estate value is at this time:

Your value of your property includes all life insurance, pension, real estate, bank accounts & CD's, cars, personal property, household goods to include both separate and community property, but do not subtract any liabilities nor debts since we are requesting your gross value of your assets. We are asking this question because we need to know whether your estate is under the Unified Gift and Estate Tax Exclusion or Credit. If it is, we will continue preparing your last will and testament. Otherwise, you will need advanced estate planning documents that will need to be addressed with your attorney. F.Y.I.: Texas law -- somewhat awkwardly -- defines community property as that which is not separate property. Separate property is that which was owned by a spouse before the marriage, as well as property received after marriage by gift or inheritance. Everything else is community property. For example, the earnings of both spouses during marriage are community property. Income from separate property during marriage is also community property. When drafting your Will, you must consider what property you own outright and what property you own jointly with another.

(For estate tax purposes): $_____

DISPOSITION OF PROPERTY

STATE LAW NOW REQUIRES NOTIFICATION TO THE BENEFICIARIES OF THE WILL WHEN THE WILL IS PROBATED

- If you are married and your spouse survives you, or if you are single, describe the way you want your property to pass under your will.

(For instance, "If my spouse survives me, I want all my property given to my wife." Another example is "All my property to my sister, Beth.") There will be another question below whereby you may choose an alternate beneficiary.

_____

• If you are married and your spouse DOES NOT survive you, or if you are single and your primary beneficiary DOES NOT survive you, describe the way you want your property to pass under your will. (alternate beneficiary)

(For instance, "If my spouse does not survive me, I want all my property given to my children in equal shares." Another example is " If my sister, Beth does not survive me, I want all my property to go to my brother, Al.)

_____

Are all persons named above U.S. Citizens? _____ yes _____ no

POWER OF ATTORNEYS AND HEALTH CARE DOCUMENTS

Q. What is a Financial Power of Attorney?

A. A power of attorney (POA) is an instrument by which one person, as principal, appoints another as his agent and gives him or her the authority to act on behalf of the principal. The person holding a power of attorney is known as an "attorney in fact" or "agent."

We usually prepare our Financial Power of Attorney (more specifically known as a "Statutory Durable Power of Attorney") to be in force at the time of signing and to remain in force notwithstanding any subsequent disability or incapacitation of the principal. The Financial Power of Attorney gives you the choice of whether the POA is effective on the date signed or upon disability or incapacity. Further, the powers granted to the agent are usually broad enough to ensure that the agent can perform many of the legal acts that the principal can perform. This means that the agent can cash checks made out to the principal, sell the principal's interest in real property, bind the principal in a loan transaction, etc. The Financial Power of Attorney offers a choice of one or more powers for your agent. We usually recommend choosing all of the powers, but can broaden or limit your agent's power as you wish. The value of a Financial Power of Attorney is found in its power to handle your financial affairs in the event of incapacitation. Many of our clients wisely choose their spouses to act as their agent under the Financial Power of Attorney. This is a recommended choice due to the fact that many of the assets held by a married couple are community assets. With a Financial Power of Attorney in force, each spouse has full power and authority to manage the marriage assets and liabilities. This would include the power to transfer real estate held in both names and to cash checks made payable to the other spouse. If a Financial Power of Attorney was not in force, and a spouse was incapacitated, the other spouse could not continue with the affairs of the household unless a guardianship proceeding was initiated on behalf of the incapacitated spouse.

Who should be the agent? In view of the authority and discretion conferred by a financial power of attorney, the agent must be someone in whom the principal has complete trust and confidence. If you are married, we recommended you designate your spouse.

List your primary agent and alternate agent(s) below:

Primary Agent: _____

Address: _____

County Residing in: _____

Alternate Agent: _____
(No address needed for alternate agent)

Do you want you Power of Attorney to be effective immediately upon executing it?

A Statutory Durable Power of Attorney has the option on whether you want it to be effective immediately or only upon your disability or incapacity. We strongly recommend that you choose for the POA to be effective immediately because of two reasons: 1) If you can't trust your agent now, then you should not trust them when you are incapacitated or disabled because that is when you would be most vulnerable; and 2) Sometimes it is not clear on whether a person is actually disabled or incapacitated for a physician to say they can't make their own personal financial decisions and your stuck in limbo when there are pressing financial issues that need to be addressed. For example, the utility company won't give you the amount owed to pay the water bill to continue service because you are not the account holder nor the owner/tenant of the property

until you get a letter from a doctor to say that he or she is disabled or incapacitated since the POA is not effective immediately. With the POA that is effective immediately, the utility company will more than likely provide you with the amount and you can assure that service will not be discontinued without the need of a letter from a physician.

_____ Power of Attorney effective immediately; or

_____ Power of Attorney effective only upon my disability or incapacity.

Do you want your agent under the Power of Attorney to have the ability to make tax-motivated gifts?

A Statutory Durable Power of Attorney has the option on whether you want your agent to have the power to make tax-motivated gifts. We recommend that you choose "Yes" because you never know if your estate will be larger than the estate tax credit. Why is this important? Gifting is an important tool in estate planning and if done properly under the advice of a financial adviser, CPA or Tax Attorney, you can save money that may otherwise be taxed by the state and federal government.

_____ Yes _____ No

Q. What is a Medical Power of Attorney?

A. Texas law permits a Medical Power of Attorney ("MPOA"). The purpose of the MPOA is to permit a person to create a MPOA only for purposes of medical care, and it permits the appointed person to make health care decisions for an incapacitated principal (the person whom has appointed an agent under the MPOA). The MPOA becomes effective only after the attending physician certifies in writing that the principal lacks the capacity to make health care decisions, but no treatment is permitted if the principal objects and has the capacity to make such decisions or has an Advanced Directive to indicate what treatments are to be withheld or discontinued.

Who do you want to be your agent under your MPOA? (Please state name, address and telephone number)

Please list the name, address and phone number below to be your agent under your MPOA. *If married, we recommend you name your spouse. The same rules apply for co or joint agents as with the POA listed above.

Name of Primary Agent: _____

Address of Primary Agent: _____

Phone #'s of Primary Agent: _____

Who do you want to be your alternate agent under your MPOA? (Please state name, address and telephone number)

*If your named agent cannot perform his or her duties as your agent under the power of attorney, then please name an alternate agent with name, address and phone number.

Name of 1st Alternate Agent: _____

Address of Alternate Agent: _____

Phone #'s of Alternate Agent: _____

Who do you want to be your second alternate agent under your MPOA? (Please state name, address and telephone number)
*If your named and alternate agents cannot perform their duties as your agent under the power of attorney, then please name a second alternate agent with name, address and phone number.

Name of 2nd Alternate Agent: _____

Address of Alternate Agent: _____

Phone #'s of Alternate Agent: _____

Q. What is a HIPAA Release?

A. Congress passed a law entitled the Health Insurance Portability and Accountability Act ("HIPAA") that limits disclosure of protected medical information. The HIPAA release allows you to designate authorized persons to obtain your medical information. **PLEASE NOTE: THESE PERSONS ARE USUALLY THE SAME AGENTS YOU NAMED ABOVE FOR YOUR MEDICAL POWER OF ATTORNEY, IF YOU WANT THE SAME AGENTS AS ABOVE, PLEASE CHECK BELOW:**

_____ SAME AS ABOVE.

Q. What is a Declaration of Guardian? *(Adult Declaration of Guardian)*

A. A Declaration of Guardian is a document in which a competent adult designates a person to serve as guardian of his person or estate in the event he becomes incompetent. An individual may, in the declaration, also disqualify named persons from serving as guardian of his person or estate. Once the named person is so disqualified, he may not be appointed guardian under any circumstances.

Because of the widespread use of power of attorney, we do not see many guardianships for adult persons. However, the need for guardianship could arise, and our clients sometimes prefer to choose whom the court will appoint as guardian. Please designate in order of succession the guardian of the person and the guardian of the estate. We recommend choosing the same individuals as guardians for your person and your estate. If you desire different persons for each, please speak directly to the attorney regarding your wishes. If you are married, we recommend to name your spouse. No addresses needed here.

Name of Primary Guardian: _____

Name of 1st Alternate Guardian: _____

Name of 2nd Alternate Guardian: _____

Who do you want to disqualify from becoming your guardian?
With the Declaration of Guardian you may disqualify a person from becoming your guardian. For example, you have a sister that is a spendthrift and you believe that if she was ever appointed as your guardian she would squander all your money away and not use it in your best interest. However, this would have to be a person that would only seek to be appointed when none of the named guardians are unable to perform or refuse to fulfill their obligations as your guardian.

Name of Person(s) to disqualify from becoming your guardian: _____

Q. What is a "Directive to Physicians and Family or Surrogates"?

A. A Directive to Physicians and Family or Surrogates (also known as a living will or advance directive) is a document which provides instructions to an attending physician to either withhold life sustaining treatment, withdraw life sustaining treatment, decision to be made by my agent listed on my Medical Power of Attorney or my doctor and my agent shall make the decision, in the event of a terminal or irreversible condition. The directive allows you to determine if you would prefer life support withdrawn if you are terminally ill and will die in six (6) months or if you are in an irreversible condition and will die without life support. If you choose to eliminate life sustaining procedures, in either situation you would only receive treatment that keeps you comfortable.

Please note that so long as you are capable of making your wishes known this document does not come into play. It only applies until you can no longer make your wishes know. We have also included an additional request that once life sustaining is withheld, you want pain medication, don't want to be a vegetable, and rather pass away at home if not a burden on the family.

Please check one choice for *Terminal* and one choice for *Irreversible*:

If I have a ***"TERMINAL CONDITION."*** If, in the judgment of my physician, I am suffering with a terminal condition from which I am expected to die *within six months*, even with available life-sustaining treatment provided in accordance with prevailing standards of medical care:

_____Terminal: Withhold life sustaining treatment (no life support, but Dr. makes decision)

_____Terminal: Do not withhold life sustaining treatment (you want life support and want to stay alive in this condition as long as possible)

_____Terminal: Decision to be made by my agent listed on my Medical Power of Attorney (only your agent will make the decision about life support)

_____Terminal: My doctor and my agent shall make the decision (both make the decision on when to stop life support, but agent has the right to get a second or third opinion if Dr. does not agree)

If I have an ***"IRREVERSIBLE CONDITION."*** If, in the judgment of my physician, I am suffering with an irreversible condition so that I cannot care for myself or make decisions for myself and am expected to die without life-sustaining treatment provided in accordance with prevailing standards of care:

_____ Irreversible: Withhold life sustaining treatment (no life support, but Dr. makes decision)

_____ Irreversible: Do not withhold life sustaining treatment (you want life support and want to stay alive in this condition as long as possible)

_____ Irreversible: Decision to be made by my agent listed on my Medical Power of Attorney (only your agent will make the decision about life support)

_____ Irreversible: My doctor and my agent shall make the decision (both make the decision on when to stop life support, but agent has the right to get a second or third opinion if Dr. does not agree)

* OPTIONAL FORMS *

DECLARATION REGARDING ANATOMICAL GIFTS

The Anatomical Gift document that we provide you will allow you to indicate what you are willing to donate. Some people not only want to donate their organs to help save other people's lives but for education or medical research. Also, you may indicate which organization you wish to use. If your religious or personal beliefs prevent you from donating, then you may wish to have a special medical power of attorney drawn up with your attorney. Unless you specify, your agent under your MPOA will have the final say so on who should receive the organ.

Do you wish to be an organ donor? _____ yes _____no

Please choose all those that apply to the type of organ donation you want:

Anatomical Gift: *(Initial only one primary statement.)*

_____ I ***do not*** want to make an organ or tissue donation and I do not want my attorney for health care, proxy, or other agent or family to do so.

_____ I have already signed a written agreement or donor card regarding organ and tissue donation with the following individual or institution: _____.

On my death, I give *(Initial one):*

_____ Any needed organ or body parts.

_____ Only the following organ or body parts: _____

For: *(Initial only one):*

_____ Any legally authorized purpose *(i.e., transplantation, therapy, research, or education)*.

_____ Transplant or therapeutic purposes only.

DISPOSITION OF REMAINS

There are many times in which a family does not know how you want your remains to be disposed. For instance, you may want to be cremated but then your ashes buried with your spouse if he or she dies after you. This document allows for special directions limiting the power granting your agent regarding your remains: (examples: cremation, traditional burial, military honors, police department honors, fire department honors, religious preference, etc.). Indicating that you have a pre-arranged funeral and whom it is with, is another use for this document. This document in some cases can direct a Medical Examiner to whom the body can be released to if your died of an unusual death that needed further examination.

Please state your wishes as it pertains to how you want your remains. If you are unsure on how you want your service to be carried out, then just state *"I want my designated agent to make all arrangements concerning the disposition of my remains."*

_____ _____

_____ _____

_____.

Who do you want to be appointed as your agent to dispose of your remains? (Please state name, address and telephone number) If married, we recommend your spouse. Please list name, address and telephone number. If it is the same as the Medical Power of Attorney, please put "same as MPOA." Same rules apply for co and joint agents as with the financial power of attorney, but however, it is not recommended to have co or joint agents.

If you would like to list the same agents as your Medical Power of Attorney, please write: "same as MPOA."

Name of Primary Agent: _____

Address of Primary Agent: _____

Phone #'s of Primary Agent: _____

Name of 1st Alternate Agent: _____

Address of Alternate Agent: _____

Phone #'s of Alternate Agent: _____

Name of 2nd Alternate Agent: _____

Address of Alternate Agent: _____

Phone #'s of Alternate Agent: _____

Q. Location of Important Items - Where do I keep my Will?

A. Your Will should be kept in a central location that offers a high degree of security and can be easily located in the event of your death. You should give careful consideration to where you keep your Will and other important papers an documents.

If a lock box is used at a Bank, it is advisable to include other persons, specifically your Executor and alternate Executors on the signatory card. By doing this, you can provide your executor and alternate executors with access to the lock box and its key and avoid the need of obtaining a court order to open your lock box and retrieve your Will. It is always advisable to keep a current list of the important documents in the location so that you know and your alternate Executors will know that all important information on your estate is present in that location.

QUESTIONS YOU MAY HAVE FOR THE ATTORNEY AT THE TIME OF YOUR APPOINTMENT:

_____

_____

** PLEASE INITIAL NEXT TO ONE OF THE FOLLOWING **

_____ **I hereby give Group Legal Services consent to transmit my estate planning drafted documents via electronic mail (e-mail); My e-mail address is: _____**

or

_____ **Please deliver my estate planning drafted documents via U.S. Mail**.

Please contact ALVIE RIOJAS at (210) 822-7678 or e-mail her at ariojas@grouplegalservices.org or alvieriojas21@gmail.com for an appointment to meet with one of our Group Legal attorneys to review this Estate Planning Packet.

THIS PAGE IS FOR ATTORNEY USE ONLY

ASSETS:

1. Average cash balance (including savings), Bonds, Stocks, Business Interests:
   TOTAL VALUE: $_____

2. Residence:
   Fair Market Value: $_____

3. Other Real Estate:
   Fair Market Value: $_____ (describe)_____
   Fair Market Value: $_____ (describe)_____

4. Autos, Boats, Planes:
   (describe)_____ Value: $_____
   (describe)_____ Value: $_____
   (describe)_____ Value: $_____
   (describe)_____ Value: $_____

5. Livestock: Value: $_____

6. Benefits:
   SOCIAL SECURITY - Value: $_____ PROFIT SHARING - Value: $_____
   ICMA - Value: $_____ PENSION - Value: $_____
   401K - Value: $_____

7. Life Insurance Policies: _____
   Total Amount $_____

8. Other assets, including furnishings of the house, special collections, etc.: TOTAL VALUE:$_____

NOTES FROM ATTORNEY

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