

Estate Planning Consultation – Satterfield Legal, PLLC

Date: _____

Referral Source: _____

Your Name: _____

Your Spouse's Name: _____

EXECUTOR: _____
Name, Relationship

Backup: _____
Name, Relationship

TRUSTEE: _____
Name, Relationship

Backup: _____
Name, Relationship

GUARDIAN: _____
Name, Relationship

Backup: _____
Name, Relationship

POA: _____
Name, Relationship

Backup: _____
Name, Relationship

HCPOA: _____
Name, Relationship

Address: _____

Tele: _____

Email: _____

Backup HCPOA: _____
Name, Relationship

Address: _____

Tele: _____

Email: _____

EXECUTOR: _____
Name, Relationship

Backup: _____
Name, Relationship

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Name, Relationship

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Email: _____

Backup HCPOA: _____
Name, Relationship

Address: _____

Tele: _____

Email: _____