



# THE LAW OFFICE OF RANDY HOPE STEEN, LTD.

## SUPPLEMENTAL ESTATE PLANNING

*For parents with special needs children over the age of eighteen (18) years old*

### Child Information

Full Legal Name

Gender

Male

Female

### Child Contact Information

Phone #

Cell Phone #

Email

### Address of Child

Street

City

State

Zip

### Financial General Power of Attorney: Agent or Co-Agent

First Choice

Second Choice

If more than one Agent is selected, may either Agent act alone, independent of the other Agent, or must all Co-Agents act together?

### Health Care Power of Attorney & Living Will: Agent or Co-Agent

First Choice

Second Choice

If more than one Agent is selected, may either Agent act alone, independent of the other Agent, or must all Co-Agents act together?

## Assets and Liabilities

	Ownership:		Single	Joint
Mutual Funds Attach Statements				
Note and Mortgage Receivables Attach Copies of Notes and Mortgages				
Business Interests Attach Copies of stock certificates, partnership agreements, and/or other documentation				
Inheritance, etc.				
Automobiles				
Jewelry and Collections listed on Insurance				
Non-IRA Tax Qualified Retirement Plans Attach Statements				
IRAs Attach Copies of Statements				
Life Insurance Attach Copies of All Policies				
Annuities Attach Copies of All Policies				
Other Assets Attach Copies of Documents pertaining to such assets				
Bank Accounts Attach copies of Statements				
Real Estate Residence; Attach copy of deed				
Real Estate Other; Attach copies of all deeds				
Savings Certificates CDs; Attach copies of statements				
Stocks - Non Mutual Funds Held by Broker; Attach statements				
Stocks - Non Mutual Funds Not Held by Broker; Attach statements				
Bonds - Non Mutual Funds Not Held by Broker; Attach statements				
Bonds - Non Mutual Funds Held by Broker; Attach statements				