

PRIMARY BENEFICIARIES: (If you are deceased)

1. _____ Percentage of Assets _____
2. _____ Percentage of Assets _____
3. _____ Percentage of Assets _____
4. _____ Percentage of Assets _____
5. _____ Percentage of Assets _____
6. _____ Percentage of Assets _____

CONTINGENT BENEFICIARIES (If you and all Primary Beneficiaries are deceased):

1. _____ Percentage of Assets _____
2. _____ Percentage of Assets _____
3. _____ Percentage of Assets _____
4. _____ Percentage of Assets _____
5. _____ Percentage of Assets _____
6. _____ Percentage of Assets _____

GUARDIANS OF MINOR CHILDREN:

First Alternate _____

Second Alternate _____

NOTES: 1. This would be the person(s) who will care for your children in the event both biological (legal) parents are deceased. 2. It is best to name individuals as Guardian and Alternates.

TRUSTEE(S) FOR BENEFICIARIES UNDER THE AGE OF _____ :

First Alternate

Second Alternate

NOTES: 1. This would be the person designated to manage assets on behalf of minor children that are listed as beneficiaries. 2. Age indicates the age that a Beneficiary is to receive their share of the Estate from the Trustee. This can be a lump sum upon reaching age _____ or in increments as follows: 1/3 at age _____, 1/3 at age _____, and the balance at age _____.

EXECUTOR(S):

First Alternate

Second Alternate

NOTES: 1. It is best to name individuals as Alternates.

DURABLE POWERS OF ATTORNEY/LIVING WILLS

Principal:

Last Name First Name Middle Name

Agent:

Last Name First Name Middle Name

Relationship to the Principal: _____

In the event of the incapacity of the originally appointed Agent, the principal should list alternate Agents to handle affairs on behalf of the principal. Please list the sequence of alternate Agents.

Alternates:

1. _____
Last Name First Name Middle Name

Address: _____ Home Phone: _____
_____ Cell Phone: _____

Relationship to Principal: _____

2. _____
Last Name First Name Middle Name

Address: _____ Home Phone: _____
_____ Cell Phone: _____

Relationship to Principal: _____

3. _____
Last Name First Name Middle Name

Address: _____ Home Phone: _____
_____ Cell Phone: _____

Relationship to Princ: _____

NOTES: 1. Generally, the same sequence of Alternates is used for the Durable Powers of Attorneys and Living Wills. 2. Children are usually only listed as Alternates if they are of legal age (18) to serve as an Alternate.

RETURN FORMS TO:

**TODD H. LAHR, ESQ.
LAHR & LAHR
ATTORNEYS AT LAW
3570 HAMILTON BLVD
SUITE 303
ALLENTOWN, PA 18103-4513
(610) 398-2440
FAX (610) 706-7409**

WEBSITE: WWW.LAHLAW.COM

EMAIL: LAHLAW@GMAIL.COM