



# The Rutherford Law Firm, PLLC

WILLS · TRUSTS · PROBATE · ESTATE ADMINISTRATION

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## ESTATE PLANNING · CLIENT WORKSHEET

# Prepare for Your Visit With the Attorney

Most estate plans begin with one good conversation. About one in three U.S. adults has a will;<sup>1</sup> the rest leave those decisions to Texas law.<sup>2</sup> Bring this worksheet to your consultation. You do not need every answer, and you do not need to write anything you would rather discuss in person. Anything you complete helps the firm understand your family and goals and use your time well.

### ◆ Before your visit, gather what you can

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|--|---|
| <input type="checkbox"/> Photo identification  | <input type="checkbox"/> Life insurance policies and beneficiary designations |
| <input type="checkbox"/> Any existing will, trust, or power of attorney <sup>3</sup>     | <input type="checkbox"/> Business ownership documents, if any                 |
| <input type="checkbox"/> Deeds for real estate you own                                   | <input type="checkbox"/> Most recent property tax statement                   |
| <input type="checkbox"/> Recent statements for bank, investment, and retirement accounts | <input type="checkbox"/> A list of significant debts                          |

### ◆ About you

Full legal name

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Date of birth

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Home address

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County of residence

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Phone

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Email

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Marital status

Spouse's full name (if married)

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### ◆ Your family

Children and other dependents (name, age, relationship). Note anyone with special needs.

If you have minor children, your will can name a guardian for them. Without a will, Texas law, not you, sets who inherits and how an estate is handled.<sup>2</sup>

## ◆ Your assets at a glance

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Real estate (addresses)

Approx. value

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Bank & investment accounts (institutions)

Approx. total

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Retirement accounts

Life insurance

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Business interests, valuable personal property, or anything you especially want to pass to a specific person

## ◆ People you trust

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Executor — the person you would name to carry out your will. Texas sets an order of priority for who may serve.<sup>4</sup>

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Agent for finances — who could handle financial matters if you could not. This is done with a statutory durable power of attorney.<sup>5</sup>

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Agent for health care — who could make medical decisions for you. This is done with a medical power of attorney and a directive to physicians.<sup>6</sup>

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Guardian for minor children (if applicable)

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## ◆ Your goals and questions

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In a sentence or two, what would you most like your plan to accomplish?

Questions you want to ask the attorney

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### REFERENCES & SOURCES

1. Pew Research Center, *Experiences With Estate Planning and Discussing End-of-Life Preferences* (Nov. 6, 2025) (about 32% of U.S. adults report having a will). [pewresearch.org](https://www.pewresearch.org)
2. Tex. Est. Code §§ 201.001–201.003 (intestate succession; how property passes when there is no will). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
3. Tex. Est. Code § 251.051 (a Texas will must be in writing, signed, and attested by two credible witnesses age 14 or older). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
4. Tex. Est. Code § 304.001 (order of persons qualified to serve as executor or administrator). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)

5. Tex. Est. Code §§ 751.001, 752.051 (Durable Power of Attorney Act; statutory durable power of attorney form). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
6. Tex. Health & Safety Code §§ 166.033, 166.164 (directive to physicians; medical power of attorney form). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
7. Tex. Est. Code § 256.003 (a will generally must be admitted to probate within four years of death). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
8. Free, plain-language guidance: Texas Law Help, *Wills, Estate Planning and Probate*. [texaslawhelp.org](https://texaslawhelp.org); Texas State Law Library, *Wills & Directives*. [guides.sll.texas.gov](https://guides.sll.texas.gov)
9. Texas Disciplinary Rules of Professional Conduct, Part VII (Rules 7.01–7.06), governing lawyer communications and advertising. [texasbar.com/tdrpc](https://texasbar.com/tdrpc)

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