

ESTATE PLANNING

CONFIDENTIAL CLIENT INFORMATION

CLIENT 1

Name _____

Date of Birth _____

SSN _____

Cell Phone _____

Text ☐ Yes ☐ No

Email Address _____

US Citizen ☐ Yes ☐ No

Date of Marriage _____

Prior Marriage ☐ Yes ☐ No

Name _____

How Terminated ☐ Death ☐ Divorce

LEGAL RESIDENCE

Address _____

City/State _____

Zip _____

CLIENT 2

Name _____

Date of Birth _____

SSN _____

Cell Phone _____

Text ☐ Yes ☐ No

Email Address _____

US Citizen ☐ Yes ☐ No

Prior Marriage ☐ Yes ☐ No

Name _____

How Terminated ☐ Death ☐ Divorce

Home Phone _____

Legal Documents (Current)

Last Will and Testament ☐ Yes ☐ No

Trust ☐ Yes ☐ No

Durable Power of Attorney - Financial ☐ Yes ☐ No

Durable Power of Attorney - Healthcare ☐ Yes ☐ No



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Beneficiaries

Children, Grandchildren, and Other Beneficiaries. In the notes column, identify any children by a prior marriage, any beneficiary who has special needs, and/or who are not U.S. citizens.

Name	Date of Birth	Relationship	Notes

Attorney-in-Fact

AGENT FOR HEALTHCARE POWER OF ATTORNEY

Who would you choose to make healthcare decisions on your behalf in the event you cannot personally make your wishes known? You can name as many as 4, but we recommend at least 2.

AGENT FOR FINANCIAL POWER OF ATTORNEY

In the event you're unable to do so, who would you choose to pay your bills, write checks, and manage your assets not held in trust? You can name as many as 4, but we recommend at least 2.

Assets & Investments

BANK ACCOUNTS, CREDIT UNION ACCOUNTS, & CERTIFICATE OF DEPOSITS

Name of Bank	Owner	Type of Acct.	Estimated Value

IRAS, 401KS, DEFERRED COMPENSATION, ANNUITIES, STOCKS, MUTUAL FUNDS, BONDS, & 529s

Company	Owner	Type of Acct.	Estimated Value

REAL ESTATE ASSETS

Property Address	How Titled	Estimated Value

LIFE INSURANCE POLICIES

Company Name	Covered Person	Type of Insurance	Cash Value

Other Information

Advisory services are offered through Buska Wealth Management, LLC, an SEC Investment Advisor. Insurance products and services are offered through Buska Retirement Solutions, Inc., an affiliated company. Tax services are offered through Legacy Tax Solutions, LLC, an affiliated company. Buska Retirement Solutions, Inc. and Buska Wealth Management, LLC do not provide legal advice. Estate planning services offered through Estate Guru. Buska Retirement Solutions, Inc. and Buska Wealth Management, LLC are not affiliated with or endorsed by the Social Security Administration, federal Medicare program, or any other government agency. Call to speak with a licensed agent to discuss your Medicare Health Plan options including Medicare Supplement, Medicare Advantage, and Part D Prescription Drug Plans.