

ESTATE PLANNING CHECKLIST
(CONFIDENTIAL INFORMATION)

Where spaces are insufficient, supplement by letter (H-Husband; W-Wife; D-Daughter; S-Son; F-Father; M-Mother; J-Joint) or attach schedule.

Name: _____ Spouse's Name: _____

DOB: _____ Spouse's DOB: _____

SS#: _____ Spouse's SS#: _____

Address: _____

County: _____ Twp: _____ Telephone: _____ (h) _____ (w)

Do you have an existing Will? _____ Where located: _____

Children (*living, **deceased), other relatives of husband and wife to be provided for:

Name	Age	Relationship	No. of Children
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Personal Representative: _____

Alternate Personal Rep: _____

Guardian of minor children: _____

Alternate Guardian: _____

Trustee: _____

Successor Trustee: _____

How do you want your estate to be distributed: (A statement in your own words concerning the ultimate distribution of your property.)

Alternate distribution: In the event a designated beneficiary predeceases you, how do you wish that beneficiary's share to be distributed? _____

SPECIFIC BEQUESTS: Description of gift or monetary amount & name and address of person or entity receiving same.

CHARITABLE BEQUESTS: Description of gift or monetary amount & name and address of person or entity receiving same.

PROPERTY: Approximate figures will be sufficient; include personal effects and household goods (lump), automobiles, collections (art, books, stamps, coins), proprietorship assets (sole proprietorship, partnership, close corporation), bank accounts, stocks, bonds, insurance (on lives of others only), land contracts, (state whether vendor's or vendee's interest), notes, mortgages, real estate (state whether improved, mortgaged), etc.

<u>Property</u>	<u>Date Acquired</u>	<u>Cost Basis</u>	<u>Market Value of</u>			<u>Signi- ficant Factor</u>
			<u>H</u>	<u>W</u>	<u>Joint</u>	
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

REAL ESTATE: Attach a legible copy of Deed, Land Contract, etc. for each property owned.

LIFE INSURANCE:

<u>Ins'd (H,W)</u>	<u>Amount</u>	<u>Company</u>	<u>(A-Annuity) (L-Life) (T-Term Life) Kind</u>	<u>Owner (H,W,etc)</u>	<u>Beneficiary</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

EXPECTED INHERITANCES: _____

PENSIONS OR PROFIT-SHARING BENEFITS: _____

OTHER INCOME & DEBTS: (salaries, loans to others, promissory notes, land contract payments, etc.): _____

SAFETY DEPOSIT BOX: _____

ACCOUNTANT: _____

STOCK BROKER: _____

STOCKS & BONDS: _____

Have you ever resided in one of the following community property law states while you were married: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin? Yes ___ No ___

Name of state and year resided there _____