

ESTATE PLANNING PERSONAL INFORMATION

You

Your Spouse

Name: _____

Address: _____

Telephone #s: Home: _____

Work: _____

Cell: _____

Email Address: _____

Social Security Number: _____

Date of Birth: _____

CHILDREN: List the name(s) and birth dates.

GIFTS:

Are there any gifts of specific property (e.g., family heirlooms, jewelry, etc.) or cash that you would like to go to any specific individual(s) or organization(s), including charitable bequests?

Gift

To Whom

REPRESENTATIVES UNDER THE WILL:

Guardian for minor children: _____

Trustee for minor children: _____

(Guardian and Trustee may be the same person)

Executor: _____

(May be an individual or a trust company; typically it is the spouse)

Successor Executor(s): _____

POWERS OF ATTORNEY:

Agent for Power of Attorney for Health Care: _____

(typically spouse)

Successor agent(s): _____

Agent for Power of Attorney for Property: _____

(typically spouse)

Successor agent(s): _____

LIVING WILL (Individual direction not to postpone imminent death with life support systems):

Is a living will desired? _____ Yes _____ No

ESTATE PLANNING FINANCIAL INFORMATION

(attach separate sheet if necessary)

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
<u>BANK ACCOUNTS:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>CERTIFICATES OF DEPOSIT:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>STOCKS:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>INDIVIDUAL RETIREMENT ACCOUNTS:</u>			
_____	\$ _____	\$ _____	
_____	\$ _____	\$ _____	

<u>LIFE INSURANCE:</u>			
_____	\$ _____	\$ _____	
_____	\$ _____	\$ _____	

<u>REAL ESTATE:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>AUTOMOBILES:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>OTHER ASSETS:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

<u>REAL ESTATE MORTGAGES:</u>			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

Dated: _____

_____ Husband _____ Wife