ESTATE PLANNING PERSONAL INFORMATION

Name: ______________________________

Address: ____________________________
____

Telephone #s: ___________________________ ________________________________

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)
Successor Executor(s):____

POWERS OF ATTORNEY:

Agent for Power of Attorney for Health Care:____

Successor agent(s): _____________________________________

Agent for Power of Attorney for Property:____

Successor agent(s):______________________________________

LIVING WILL:
Is a living will desired? _______Yes _______No

ESTATE PLANNING FINANCIAL INFORMATION

(attach separate sheet if necessary)

BANK ACCOUNTS:

_____________________ $_________

_____________________ $_________

_____________________ $_________

_____________________ $_________

CERTIFICATES OF DEPOSIT:

____________________________ $_________

____________________________ $_________

STOCKS:

_____________________________ $__________

_____________________________ $__________

INDIVIDUAL RETIREMENT ACCOUNTS:

_____________________________ $______________

_____________________________ $______________

LIFE INSURANCE:

_______________________________ $_____________

_______________________________ $_____________

REAL ESTATE:

___________________________________ $__________

___________________________________ $__________

___________________________________ $__________

AUTOMOBILES:

______________________ $__________

______________________ $__________

OTHER ASSETS:

______________________________ $__________

______________________________ $__________

______________________________ $__________

______________________________ $__________

______________________________ $__________

REAL ESTATE MORTGAGES: $__________

$__________

NET WORTH:________________

Dated:_________________________ ____

Client