

ESTATE PLANNING INFORMATION - PERSONAL DATA

Please provide personal data and information concerning your current assets, giving general market value and form of ownership (individually or jointly) and liabilities as follows:

Your Full Name: _____ Soc. Sec. #:

Spouse's Full Name: _____ Soc. Sec. #:

Address: _____ Phone #:

Date of Birth (self): ____ / ____ / ____ Place:

Date of Birth (spouse): ____ / ____ / ____ Place:

Children (names & ages):

Family tree (particularly relevant if no wife or children living):

Military Service - branch & serial #:

Date & Place of Marriage(s):

(If divorced, separated, ante-nuptial remarriage agreement, date & place and copy of decree or agreement):

Safe deposit box - bank & location:

Box Number: _____ Location of Key:

Person with authority to enter:

Employer's Name & Address:

Accountant's Name & Address:

Burial Instructions - cemetery & plot:

Person to contact:

CONFIDENTIAL ESTATE PLANNING INVENTORY Date:

NAME: _____ SPOUSE:

BIRTHDATE: _____ BIRTHDATE:

EMPLOYER: _____ POSITION:

Checking Accounts (Average Balance)	Your Name	Joint Names	Spouse's Name
Savings Accounts (Average Balance)			
Certificates of Deposit			
Bonds			
Stocks			
Real Estate - Home			
Commercial (Rental) Real Estate			
Recreational & Other Real Estate			
Personal Property (Jewelry, etc.)			
Household Furniture			
Autos, Trucks & Recreational Vehicles			
Life Insurance			
Annuity			
Pension (Death Benefits)			
Profit Sharing Plan, IRA, Keogh Plan			
Stock Options			
Inheritance			
Interests in Trusts			
Book Value of Business Assets from Balance Sheet			
Other			
SUB TOTAL			

LESS Liabilities	Your Name	Joint Names	Spouse's Name
Mortgages			
Loans			
Current Bills			
Other			
NET AMOUNT			

Real Property: Identity as to location, actual or estimated value, amount of any mortgage, residential or commercial property and form of ownership. Condominium interest. Actual cost basis and date of purchase. Cost basis information important for limited capital gain tax in estate under 1976 Tax Reform Act.

Cash Accounts: Total amounts of cash in checking and savings account/certificate grouped as to form of ownership (if Joint account, identify who contributed the funds).

Stocks and Bonds: Group total values as to form of ownership. You need not identify individual securities unless readily available.

Life Insurance: Indicate type of insurance, ownership of policy and designated beneficiaries. Note on this page accidental death insurance, do not include in insurance inventory.

Annuities: Indicate type of annuity, ownership of policy and designate beneficiaries.

Pension/Retirement Plans: State name of company or whether or not it is qualified with the IRS, and if you contribute to it; also, give general value of current and death benefits, and the designated beneficiary.

Personal Property: Estimated value of household furnishings, automobile(s) and other non-income producing assets; location and ownership.

Trust Interests: If you are a trustee, grantor or beneficiary of any testamentary or intervivos trust, give a general description and value of that interest.

Business Interest: Nature of business, i.e.: corporation, partnership, sole proprietorship. Type of business; Valuation; Copy of shareholder or other agreements; Deferred compensation. Copy of financial statement is helpful, if available.

Debts: Loans (bank, mortgage, insurance, brokerage account margin), amount, lender due date. Unpaid charitable pledges. Other liabilities, e.g., guarantees outstanding, obligations.

(INFORMATION NOTES CAN BE MADE ON THIS PAGE WITH SUMMARIES ON CHART ATTACHED).