



1. Are you a U.S. citizen?.....
2. Do you have a will or trust now?.....
3. Are you expecting to receive property or money from (circle all that apply).....  
If so, approximately how much?.....
4. How many deceased children do you have?.....
5. Are all your children legally yours (natural or legally adopted)?.....
6. Do you have any illegitimate children?
7. Do you have any dependents who require special care?.....  
If so, how are they related to you and how old are they?.....

You		Your Spouse	
Yes	No	Yes	No
Yes	No	Yes	No
Gift Lawsuit	Inheritance Other	Gift Lawsuit	Inheritance Other
\$ _____		\$ _____	
_____		_____	
Yes	No	Yes	No
Yes	No	Yes	No
Yes	No	Yes	No
_____		_____	

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## FINANCIAL INFORMATION

A. List your **home** and **other real estate**.

Description & Location	Titled in Whose Name	Purchase Price	Market Value	(-) Mortgage	(=) Equity
Total Net Value					

B. List any **other titled personal property** such as a car, boat, etc.

Description & Location	Titled in Whose Name	Market Value	(-) Mortgage	(=) Equity
Total Net Value				

C. List all **checking accounts, interest bearing accounts, savings accounts, money market accounts and CD's.** (**Do not** list retirement accounts, annuities, or IRA's--See E below. List stocks, bonds and mutual funds at Paragraph D.)

Name of Bank	Titled in Whose Name	Beneficiary (If Any)	Approximate Balance
Total Value			

D. List all **stocks, bonds and mutual funds (Do not list annuities, retirement accounts, annuities, or IRA's--See E below).**

Description	Titled in Whose Name	Beneficiary (If Any)	Current Value
Total Value			

E. List all **profit sharing, IRA's, pension plans and annuities.**

Description	Owner	Beneficiary	Current Value
Total Value			

F. List all **life insurance policies**.

Name of Company	Policy Owner/ Insured	Primary Beneficiary	Contingent Beneficiary	Cash Surrender Value	Death Benefit
Total Value					

G. Does anyone **owe you** money?

Description	Approx. Value
Total Value	

H. Do you have any **special items of significant value** such as coin collections, antiques, jewelry, etc.?

Description	Approx. Value
Total Value	

I. List any debts such as personal loans and credit card debt not already listed above.

Description	Amount Owed
Total Debt	

- J. Total value of everything you (and your spouse) own (add totals of line A thru line H above) \$ \_\_\_\_\_
- K. Total amount you (and your spouse) owe (total from line I above) \$ \_\_\_\_\_
- L. Subtract line K from line J. **TOTAL NET ESTATE VALUE** = \$ \_\_\_\_\_
- M. Safe deposit box information.

Location	Titled in Whose Name

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### EXECUTOR/GUARDIAN/TRUSTEE

A. **Executor** - Manages your estate after your death until distributed to heirs; usually your spouse, adult child, your attorney, trusted friend, or a bank trust department.

#1 Choice: Name \_\_\_\_\_

#2 Choice: Name \_\_\_\_\_

#3 Choice: Name \_\_\_\_\_

B. **Guardian For Minor Children**--Responsible adult who will raise your children if you die.

#1 Choice: Name \_\_\_\_\_

#2 Choice: Name \_\_\_\_\_

#3 Choice: Name \_\_\_\_\_

C. **Trustee For Children**--Manages your children's inheritance. Can be the same person as the guardian, another adult, your attorney, or a bank trust department.

#1 Choice: Name \_\_\_\_\_

#2 Choice: Name \_\_\_\_\_

#3 Choice: Name \_\_\_\_\_

**5****SPECIAL BENEFICIARIES****A. Special Gifts to Organizations**

Do you want to make a gift to a charity, foundation, religious or fraternal organization?

Name of Organization	Description of Gift

**B. Special Gifts to Individuals**

Do you want to give any specific items to a family member or other individual? (For example: wedding ring to your daughter, gun collection to a son or nephew, etc.)

Name of Person	Description of Gift

**C. Alternate Beneficiaries**

Who do you want to receive your estate if you (and your spouse) outlive all of the beneficiaries you've named above?

Name of Person/Organization	Amount/Percentage

**D. Disinheriting**

Are there any relatives that you specifically do not want to receive anything from your estate?

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**6**

**CEMETERY LOT**

If you have a cemetery lot, where is it located? \_\_\_\_\_  
Cemetery Name City State

**7**

**QUESTIONS TO ASK YOUR ATTORNEY**

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

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**BRING THE FOLLOWING DOCUMENTS WITH YOU**



- A. Originals of your existing wills, trusts, powers of attorney, etc.
- B. Deeds or other proof of how title to real estate is held.
- C. Written confirmation of ownership and beneficiary designation for life insurance policies and annuities, if any.
- D. Any antenuptial agreement and/or divorce decree.