

Estate Planning Worksheet

A. Personal and Family Information

1. Husband's Full Name: _____ DOB: _____

2. Wife's Full Name: _____ DOB: _____

3. Address: _____

4. Phone: (Hm) _____ (M) _____ (M) _____

5. Email: (Husband) _____ (Wife) _____

6. Beneficiaries' Full Names; DOB; Address; Phone; Email:

- Plan of Asset Distribution for heirs; (e.g. to spouse for life, then to beneficiaries; or otherwise for special circumstances, e.g. if step-children, or children from first marriage, or second marriage, or special needs children, require different treatment etc.);

- Names in order for back-up trustee(s) who would be in charge of executing the terms of your estate plan if something happened to both spouses; (e.g. adult children, other trusted relatives or friends);

- Names of persons who would serve as guardians of minor children, if any;

- Any other specific instructions, e.g. specific bequests to certain individuals, church, charity, etc.

ENCLOSED IS A CHECK IN THE AMOUNT OF \$ _____ FOR THE PREPARATION OF MY/OUR LIVING TRUST(s), POUR OVER WILL(s), FINANCIAL POA(s), MEDICAL POA(s), AND LIVING WILL(s). PLEASE PROCEED WITH THE PREPARATION OF MY/OUR ESTATE PLAN DOCUMENTS. THANK YOU.

Signature

Signature

B. Asset Data

I. Real Estate (current market value)

**How Owned
H/W/Jnt/Trust**

__ primary residence	\$ _____	_____
__ vacation property	\$ _____	_____
__ investment property	\$ _____	_____
__ timeshare	\$ _____	_____

II. Liquid Assets (value/balance as of most recent statement)

__ checking accounts	\$ _____	_____
__ savings accounts	\$ _____	_____
__ Certificates of Deposit	\$ _____	_____
__ IRA's	\$ _____	_____
__ Roth IRA's	\$ _____	_____
__ 403(b)	\$ _____	_____
__ 401(k)	\$ _____	_____
__ deferred compensation	\$ _____	_____
__ mutual fund accounts	\$ _____	_____
__ stocks	\$ _____	_____
__ bonds	\$ _____	_____
__ commodities	\$ _____	_____
__ annuities	\$ _____	_____
__ life insurance (cash value)	\$ _____	_____
__ REIT	\$ _____	_____
__ other	\$ _____	_____

Total Liquid Assets \$ _____

III. Total Liabilities \$ _____

Total Net Worth \$ _____