

**ESTATE PLANNING PERSONAL INFORMATION**

You

Your Spouse

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; typically it is the spouse)

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)

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

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

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

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

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

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

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

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

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

Dated: \_\_\_\_\_

\_\_\_\_\_  
Client

\_\_\_\_\_  
Client