

# ESTATE PLANNING WORKSHEET

This worksheet is a very important step in the estate planning process. By accurately completing this worksheet you will have the background information concerning your estate which is needed to plan your estate. This will save you much time when you consult with an attorney or financial planner.

## BACKGROUND INFORMATION

Name (w/middle initial) \_\_\_\_\_ Age D.O.B. \_\_\_\_\_

Spouses Name (w/middle initial) \_\_\_\_\_ Age D.O.B. \_\_\_\_\_

Occupation: \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_(Home) \_\_\_\_\_(Work)

Are you and your spouse United States citizens? \_\_\_\_\_

## Family:

Children: \_\_\_\_\_ Age \_\_\_\_\_ D.O.B. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_ D.O.B. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_ D.O.B. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_ D.O.B. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_ D.O.B. \_\_\_\_\_

Please indicate: (1) If children are by a previous marriage, stepchildren or adopted; and (2) the address of children not living with you.

**Parents (if living):**

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**Brothers/Sisters:**

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

**FIDUCIARIES**

**1. Personal Representative:** Please list, in order of preference, who you would like to serve as Personal Representative of your estate. The Personal Representative is the person who handles your financial affairs and administers your estate after your death.

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date Of Birth</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**2. Guardian:** If you have any children under the age of 18, please list, in order of preference, who you would like to serve as Guardian of any minor children. The guardian is the person who will raise and care for your children until they reach the age of 18.

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date Of Birth</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**3. Trustee:** Please list, in order of preference, who you would like to serve as Trustee of any trusts. Normally married couples nominate the other spouse as their first chose. Whomever you choose, the person selected should be reasonably skilled at managing financial matters.

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Date Of Birth</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Age for Family Trust to Terminate: \_\_\_\_\_ (22 or 25 are common ages depending upon the size of your estate and whether you anticipate graduate school.)

**SPECIAL FAMILY CONSIDERATIONS**

Prior marriages: \_\_\_\_\_

Children of prior marriages: \_\_\_\_\_

Handicapped child or other beneficiary (mental or physical): \_\_\_\_\_

Beneficiaries with special needs or problems: \_\_\_\_\_

Any other family concerns or issues you may have: \_\_\_\_\_

**FAMILY ADVISERS**

	<u>Name</u>	<u>Address</u>	<u>Phone Number</u>
Accountant	_____	_____	_____
Insurance agent	_____	_____	_____
Stock broker	_____	_____	_____
Physician	_____	_____	_____
Other	_____	_____	_____

## PROPERTY DISPOSITION

1. **Special Bequests:** This is where you specify specific gifts to specific people(Please use an attached list if necessary)
  
2. **General Bequests-(Residuary Estate)** Who shall receive the remainder of your estate?

## ASSETS

Item	\$Value/Amount	How held?(Husband, Wife or Jointly)
Cash	\$ _____	_____
Checking accounts	\$ _____	_____
Savings accounts	\$ _____	_____
Other bank accounts	\$ _____	_____
<b>Securities</b>		
Stock(company/shares)	\$ _____	_____
US Bonds	\$ _____	_____
Mutual funds	\$ _____	_____
Other	\$ _____	_____
<b>Personal Property</b>		
Household goods	\$ _____	_____
Jewelry	\$ _____	_____
Apparel	\$ _____	_____

Item	\$Value/Amount	How held?(Husband, Wife or Jointly)
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Other	\$ _____	_____
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**Real Estate**

Home	\$ _____	_____
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Recreational	\$ _____	_____
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Investment	\$ _____	_____
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Other	\$ _____	_____
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**Business Holdings**

Briefly describe business  
Corporation, LLC Partnership \_\_\_\_\_

Best estimate of fair market value	\$ _____	_____
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**Retirement**

IRA, Profit Share, 401K. etc Specify primary and alternate beneficiary designation	\$ _____	_____
_____		

IRA, Profit Share, 401K. etc Specify primary and alternate beneficiary designation	\$ _____	_____
_____		

**Insurance and Annuities**

Type (term, etc) _____ Specify primary and alternate beneficiary designation	\$ _____	_____
_____		

Type (term, etc) _____ Specify primary and alternate beneficiary designation	\$ _____	_____
_____		

**Other assets not listed above**

Type	\$Value/Amount	How held?(Husband, Wife or Jointly)
_____	\$ _____	_____
_____	\$ _____	_____

**Inheritance**

Do you or your spouse expect to receive any inheritance within the next 10 years?  
 \_\_\_\_\_ . Best estimate of amount \$ \_\_\_\_\_ .

**LIABILITIES**

Item	\$Value/Amount	How held?(Husband, Wife or Jointly)
Mortgages	\$ _____	_____
Car loans	\$ _____	_____
Personal loans	\$ _____	_____
Other bank accounts	\$ _____	_____
Business loans	\$ _____	_____
Life Insurance loans	\$ _____	_____
Other	\$ _____	_____
Mutual funds	\$ _____	_____
Other	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

## **MISCELLANEOUS**

**Estate planning concerns:** Briefly list specific concerns you may have. (examples are concerns about probate, taxes, a particular child, squabbling, attorney fees, etc)

**Questions :** You may use this space to list any questions that you want to address.

- 1.
- 2.
- 3.
- 4.

## **Funeral Arrangements**

If you have already made funeral arrangements please provide specifics.

Do you want to include arrangements such as cremation in your will?