

ESTATE PLANNING WORKSHEET

PERSONAL INFORMATION

Husband

Full Name _____

Address _____
Street City State Zip Code

Telephone: Residence (____)____-____ Business (____)____-____ Ext. _____

Birthdate: __/__/__ Birthplace: _____ SS# ____-____-____

U.S. Citizen: Yes No If not, which country? _____

Marital Status: ___ Married ___ Single ___ Widowed ___ Divorced

Wife

Full Name _____

Address _____
Street City State Zip Code

Telephone: Residence (____)____-____ Business (____)____-____ Ext. _____

Birthdate: __/__/__ Birthplace: _____ SS# ____-____-____

U.S. Citizen: Yes No If not, which country? _____

Marital Status: ___ Married ___ Single ___ Widowed ___ Divorced

FAMILY INFORMATION

Children From This Marriage

(1) _____ /____/____
Name Address Birthdate
Social Security Number: _____

(2) _____ /____/____
Name Address Birthdate
Social Security Number: _____

(3) _____ /____/____
Name Address Birthdate
Social Security Number: _____

ADOPTED CHILDREN

(1) _____ /____/____
Name Address Birthdate
Social Security Number: _____

PRIOR MARRIAGES

Husband's Former Spouse: _____

Marriage was severed by: Divorce Death of Former Spouse On: ___/___/___

Wife's Former Spouse: _____

Marriage was severed by: Divorce Death of Former Spouse On: ___/___/___

Children from this/these former marriage(s) [Please indicate which marriage for each child]:

(1) _____ /_____/_____
Name Address Birthdate
Social Security Number: _____

(2) _____ /_____/_____
Name Address Birthdate
Social Security Number: _____

YOU NEED TO CHOOSE THE FOLLOWING REPRESENTATIVES:

(Note: An executor and trustee can be the same person. In general, an executor will handle the many details at your death and a trustee may have ongoing money management responsibilities. Some people elect to have a spouse or close friend as executor and/or money manager or bank trust department as a trustee. It is wise to choose both primary and alternate representatives.)

EXECUTOR of husbands estate

Alternate

Name

Address

Name

Address

EXECUTOR of wife's estate

Alternate

Name

Address

Name

Address

TRUSTEE of husband's estate

Alternate

Name

Address

Name

Address

TRUSTEE of wife's estate

Alternate

Name

Address

Name

Address

GUARDIAN of minor children in event of husband's death

Name: _____ Address: _____

GUARDIAN of minor children in event of wife's death

Name: _____ Address: _____

GUARDIAN of minor children in event of both husband and wife's death

Name: _____ Address: _____

DISTRIBUTION

Upon my death, I desire my estate to be distributed as follows:

Surviving spouse: _____ %

Others:

(1) _____ %
Name Address

(2) _____ %
Name Address

Upon the death of the surviving spouse, the estate to be distributed is as follows:

(1) _____ %
Name Address

(2) _____ %
Name Address

(3) _____ %
Name Address

(4) _____ %
Name Address

(5) _____ %
Name Address

(6) _____ %
Name Address

Specific gifts to certain/special people:

(1) _____
Name Gift

(2) _____
Name Gift

(3) _____
Name Gift

(4) _____
Name Gift

ASSETS

Real Estate (Also include Oil and Gas Assignments): *PLEASE PROVIDE COPY OF DEED(S).*

Life Insurance:

<i>Company</i>	<i>Policy Number</i>	<i>Owner</i>	<i>Beneficiary</i>	<i>Face Amount</i>
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Annuities:

<i>Company</i>	<i>Policy Number</i>	<i>Owner</i>	<i>Beneficiary</i>	<i>Face Amount</i>
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Securities, Stocks and Bonds:

<i>Issuer</i>	<i>Registered Owner</i>	<i>Certificate #</i>	<i>CUSIP #</i>	<i>Number of shares/denomination</i>
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Royalties, patents and copyrights:

Owner, registration numbers and letters: _____

Partnership interests, LLCs, Closely held corporations:

Names of companies, percent owned, etc.: _____

Money owed to you:

Copies of notes, mortgages, deeds of trust, etc. evidencing amount owed to you:

Other Assets (such as Brokerage Accounts not listed elsewhere; Retirement Benefits not listed elsewhere; Registered animals; Trust Accounts; and Sole Proprietorships):

Estimated Value of Gross Estate: _____