

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 husband's 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 or special needs children in event of husband's death

Name: _____ Address: _____

GUARDIAN of minor or 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>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Annuities:

<i>Company</i>	<i>Policy Number</i>	<i>Owner</i>	<i>Beneficiary</i>	<i>Face Amount</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Securities, Stocks and Bonds:

<i>Issuer</i>	<i>Registered Owner</i>	<i>Certificate #</i>	<i>CUSIP #</i>	<i>Number of shares/denomination</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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: _____