

**ESTATE PLANNING WORKSHEET**

When a lawyer is consulted about estate planning, he must obtain sufficient information to prepare the documents and take the other steps that are necessary to prepare the estate. The attorney must gather the assets and perform his duties as an estate planner. A check list that will assist in both gathering the necessary information and in reminding the lawyer of the steps to be taken is frequently useful. This list will assist both of us in obtaining the proper information about your estate.

1. NAME: \_\_\_\_\_

2. ADDRESS: \_\_\_\_\_

\_\_\_\_\_

3. TELEPHONE NUMBER: \_\_\_\_\_

4. DATE OF BIRTH: \_\_\_\_\_

5. SOCIAL SECURITY NUMBER: \_\_\_\_\_

6. FIRST SPOUSE: \_\_\_\_\_

7. DATE OF DIVORCE OR IF WIDOWED: \_\_\_\_\_

8. SECOND SPOUSE: \_\_\_\_\_

9. DATE OF BIRTH: \_\_\_\_\_

10. SOCIAL SECURITY NUMBER: \_\_\_\_\_

11. CHILDREN (ADOPTIONS – EVEN IF REVOKED):

NAME AND ADDRESS

SS#

DATE OF BIRTH

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. DO YOU HAVE A BANK BOX? \_\_\_\_\_

IF SO, WHERE IS IT LOCATED? (NAME OF BANK) \_\_\_\_\_

\_\_\_\_\_

WHERE IS THE KEY? \_\_\_\_\_

13. PROBABLE VALUE OF PROPERTY:

MOVABLE \$ \_\_\_\_\_

IMMOVABLE \$ \_\_\_\_\_

14. LIST OF REAL ESTATE ASSETS:

(A) HOME \_\_\_\_\_

\_\_\_\_\_

(B) OTHER \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

15. LIST OF OTHER ASSETS:

(A) BANK ACCOUNTS (CHECKING AND SAVINGS) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(B) INTEREST IN ANY BUSINESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ARE THERE ANY SUB-CHAPTER S CORPORATION? \_\_\_\_\_

(C) SAVINGS & LOAN ACCOUNTS OR CREDIT UNION ACCOUNTS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(D) LIFE INSURANCE:

| COMPANY | POLICY # | AMOUNT | BENEFICIARY |
|---------|----------|--------|-------------|
| _____   | _____    | _____  | _____       |
| _____   | _____    | _____  | _____       |
| _____   | _____    | _____  | _____       |

(E) ANNUITIES \_\_\_\_\_

\_\_\_\_\_

(F) THRIFT FUNDS AND CREDIT UNIONS \_\_\_\_\_

\_\_\_\_\_

(G) U.S. BONDS \_\_\_\_\_

\_\_\_\_\_

(H) OTHER BONDS \_\_\_\_\_

\_\_\_\_\_

(I) STOCKS \_\_\_\_\_

\_\_\_\_\_

(J) UNPAID SALARY \_\_\_\_\_

(K) ACCOUNTS RECEIVABLE \_\_\_\_\_

\_\_\_\_\_

(L) RENTS RECEIVABLE \_\_\_\_\_

\_\_\_\_\_

(M) NOTES RECEIVABLE \_\_\_\_\_

\_\_\_\_\_

(N) CASH ON HAND \_\_\_\_\_

(O) AUTOMOBILES (GET TITLE CERTIFICATES):

YEAR \_\_\_\_\_ MANUFACTURER \_\_\_\_\_

TYPE \_\_\_\_\_

EQUIPMENT \_\_\_\_\_

MORTGAGE \_\_\_\_\_

(P) TOOLS, FIREARMS \_\_\_\_\_

\_\_\_\_\_  
(Q) ANTIQUES \_\_\_\_\_

(R) JEWELRY \_\_\_\_\_

(S) FURNITURE \_\_\_\_\_

\_\_\_\_\_  
(T) COINS – ART COLLECTIONS \_\_\_\_\_

\_\_\_\_\_  
(U) CLAIMS OR INTANGIBLES \_\_\_\_\_

(V) ESCROWS OR DEPOSITS \_\_\_\_\_

\_\_\_\_\_  
(W) DEFERRED COMPENSATION AGREEMENTS \_\_\_\_\_

\_\_\_\_\_  
(X) INDIVIDUAL RETIREMENT ACCOUNTS, KEOGH PLANS \_\_\_\_\_

\_\_\_\_\_  
(Y) MISCELLANEOUS \_\_\_\_\_

16. LIST OF DEBTS (LIQUIDATED AND CONTINGENT):

(A) MORTGAGES ON HOME, AUTOMOBILE OR OTHER PROPERTY \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CREDIT LIFE INSURANCE \_\_\_\_\_

(B) SIGNATURE LOANS AT BANK OR OTHER INSTITUTIONS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(C) CURRENT DEBTS (UTILITIES, ETC.) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_