



### Estate Planning Checklist

1. Name \_\_\_\_\_

Spouse \_\_\_\_\_

2. Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Home Phone \_\_\_\_\_

Business Phone \_\_\_\_\_

4. Social Security Number \_\_\_\_\_

Spouse's Social Security Number \_\_\_\_\_

5. Citizenship \_\_\_\_\_

Spouse's Citizenship (if different) \_\_\_\_\_

6. Location of safe deposit box, if any \_\_\_\_\_

7. Upon death, who will receive your assets?:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. If the people or entities listed in the prior sections die before you do, who will receive your assets? Contingent beneficiaries:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

9. Children:

Name(s) \_\_\_\_\_

Address(es) \_\_\_\_\_

Date(s) of Birth \_\_\_\_\_



_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

10. Family Tree Affidavit information (list name & addresses):

Father \_\_\_\_\_

Mother \_\_\_\_\_

Brother(s) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Sister(s) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other important relatives may be discussed during our consultation.

11. Proposed Fiduciaries

a. Guardians for children (it is desirable to have at lease one alternative)

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

b. Executor (it is desirable to have at least two alternate executors)

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

c. Trustee (it is desirable to have at least one alternative)

Name \_\_\_\_\_ Address \_\_\_\_\_



Name \_\_\_\_\_ Address \_\_\_\_\_  
12. Power of Attorney (for each spouse):

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

Alternate power of attorney (for each spouse):

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

13. Health care agent (for each spouse):

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

Health care agent alternate (for each spouse):

Name \_\_\_\_\_ Address \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

14. Assets and type of ownership

a. Valuable personal property

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

b. Cash and cash equivalents

i. Bank accounts, bank account numbers and approximate value

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

ii. "In trust for" accounts

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

c. Securities (stocks, bonds, mutual funds, etc.)



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d. Promissory notes and mortgages

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e. Life insurance, annuities and employee benefits

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f. Business interests

i. Proprietorship

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ii. Professional practice

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iii. Closely held business interests

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vi. Partnership interest

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g. Real estate

i. Principal residence

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ii. Vacation residence

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iii. Other residences

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vi. Undeveloped property

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15. Liabilities

a. Judgments

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b. Bank loans

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c. Promissory notes

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d. Accounts payable

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e. Loans

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f. Accrued Taxes

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16. Name, address and phone number of accountant

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