

**CONFIDENTIAL
ESTATE PLANNING INFORMATION**

Date: _____, 20____

BIOGRAPHICAL DATA

Full Legal Name: _____

Address: _____

Date of Birth: _____ Occupation: _____ SSN: _____

Home Phone: _____ Work Phone: _____ E-Mail: _____

Single Married: *Date of Marriage* _____ Widowed Divorced

SPOUSE

Full Legal Name: _____

Address: _____

Date of Birth: _____ Occupation: _____ SSN: _____

Work Phone: _____ E-Mail: _____

CHILDREN

(Including adopted children) (If no children, please give names of nearest relatives.)
(use "JT" if both spouses are parents; "H" is husband is parent, "W" if wife is parent, and "S" if you are a single parent)

Full Legal Name	Date of Birth	Parents	Residence (City & State)

FAMILY ADVISERS

	Name	Telephone Number
Accountant		
Insurance Agent		
Financial Advisor		
Personal Banker		
Physician		
Clergyman		
Other		

FIDUCIARY SELECTIONS:

Please list, in order of preference, who you would like to serve as
Personal Representative of your Estate:

Name	Relationship	Address	Date/Birth

Please list, in order of preference, who you would like to serve as
Guardian of any minor children:

Name	Relationship	Address

Please list, in order of preference, who you would like to serve as
Trustee of any trust:

Name	Relationship	Address

DISTRIBUTION PROVISIONS

Special Bequests: (please list specific bequest below, if any)

Name Person/Organization	Address	Item

Charitable Bequests: (please list specific bequest below, if any)

Name of Organization	Address	Percentage

Residue of Your Estate: (please list who is to receive your estate after any specific or charitable bequests)

Name Person/Organization	Address	Item

SPECIAL FAMILY CONSIDERATIONS

Prior Marriages: _____

Children of Prior Marriages: _____

Handicapped child or other beneficiary (mental or physical): _____

Beneficiaries with special needs or problems: _____

Other: _____

ASSETS

ITEM	VALUE	OWNERSHIP (H, W, or JT)
Cash		
Checking Accounts		
Savings Accounts		
Savings Certificates		
SECURITIES		
Stocks (name of company/number shares)		
US governmental bonds		
Corporate bonds or debentures		
Municipal bonds		

PERSONAL PROPERTY		
Household goods and furnishings		
Jewelry		
Apparel		
Motor vehicles		
Recreational vehicles		
Boats		
Collections (stamp, coin, etc.)		
REAL ESTATE		
Homestead		
Recreational		
Business		
Other		
BUSINESS HOLDINGS		
Sole proprietorship		
Partnership (general)		
Partnership (limited)		
Corporation		
Joint Venture		
Limited Liability Company		
Other		
ACCOUNTS RECEIVABLE		
Notes		
Mortgages		
Installment land contracts		
Other		

RETIREMENT, PENSION, AND OTHER PLANS		
Profit sharing plan		
IRA		
Keogh Plan		
Pension Plan		
INSURANCE AND ANNUITIES		
Straight life		
Term life		
Annuity plans		
Group life		
MISCELLANEOUS		
Interests in trusts		
Interests in other estates		
Patents		
Copyrights		
Royalties		
Crops or livestock		

LIABILITIES

ITEM	AMOUNT	WHO IS LIABLE? (H, W, or JT)
Notes		
Real estate mortgages		
Charge accounts		
Installment loans		
Life insurance loans		
Business debts		
Taxes payable		
Miscellaneous		
Other (explain)		