



KELLEY & ASSOCIATES

ESTATE PLANNING WORKBOOK

FAMILY INFORMATION

Legal Name: _____
Date of Birth: _____ Social Security Number: _____
Address: _____ Phone: () _____ - _____
Email: _____
Legal Name: _____
Date of Birth: _____ Social Security Number: _____
Address: _____ Phone: () _____ - _____
Email: _____

MARITAL INFORMATION

Single: _____ Married: _____

Date of Marriage: _____

Child Name: _____	Date of Birth: _____
Child Name: _____	Date of Birth: _____
Child Name: _____	Date of Birth: _____
Child Name: _____	Date of Birth: _____

Additional Marriage and Other Family Information:

ASSETS:

Real Property Address: _____ Do you have the Deed? _____
Real Property Address: _____ Do you have the Deed? _____

Note: We need a physical or digital copy of the GRANT DEED to fund your trust with any real property assets.

Investments:

Life Insurance Policies:

Business Interests:

Property Agreements:

SUCCESSOR TRUSTEES

These are preliminary individuals you believe would fit in the role of fiduciary for your family, ensuring that your estate is administered correctly.

Primary Successor Trustee: _____
Secondary Successor Trustee: _____
Tertiary Successor Trustee: _____

DISTRIBUTION

Upon your death, who will inherit your assets, and will you place any restrictions on that inheritance?

COMPLETE

Once you have completed this Workbook, you have a few options:

- a. You can upload the document through our Contact Portal on our website at Kelley-assoc.com.
- b. You can scan it and send it to admin@kelley-assoc.com.
- c. You can mail or physically deliver it to our office at 255 E Rincon St. #211 Corona C 92879 as quickly as you can.

FIRM CONTACT

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