

ASSET INFORMATION

REAL ESTATE: (Please list addresses, how title is held (if known), an estimated market value or assessed value, and remaining mortgage balance, if any.)

BANK ACCOUNTS (CHECKING, SAVINGS, CDs): (Please list the financial institution, an estimated balance, and whether you have named a beneficiary on the account.)

JUDGMENTS / PROMISSORY NOTES PAYABLE TO HUSBAND OR WIFE (aka Does anybody owe you money that you expect to get paid back?):

BUSINESS INTERESTS (Corporate shares, membership in LLC):

RETIREMENT ASSETS (IRAs, Pensions, SEPs, 403b and 401k): (Please list institution, estimated balance, and named beneficiaries, if any.)

INVESTMENT AND BROKERAGE ACCOUNTS: (If separate from above, please list institution, estimated balance, and named beneficiaries, if any.)

LIFE INSURANCE: (Please list policy owner, amount of coverage, and beneficiary.)

OTHER ASSETS (VEHICLES, BOATS, RVS, TRAILERS, COIN/STAMP COLLECTIONS, ARTWORK) –
(Please provide Year/Make/Model if applicable, plus an estimated value and any loan balance.)

Who do you wish to inherit your estate?

If your child is a beneficiary, how should their share be distributed if they fail to survive you?

If a child or grandchild is a beneficiary and is a minor at the time of your death, at what age or ages do you want them to receive the principal outright?

Please describe any specific gifts of personal property or money you would like to make:

Does anybody in the family have special needs we need to anticipate?

FIDUCIARY APPOINTMENTS (To be discussed with Attorney):

EXECUTOR: The executor has the responsibility to collect the assets and carry out the terms of the Will.

GUARDIAN(S): When minor children are involved, your named Guardian(s) would step in to take care of your children.

TRUSTEE: The trustee has the responsibility to administer a trust if that is part of your estate plan. Guardians can also serve as Trustees over funds when there are minor children involved.

FINANCIAL POWER OF ATTORNEY: A person appointed under the durable power of attorney can handle financial, real estate, and other matters on your behalf if you are unable to do so.

HEALTH CARE REPRESENTATIVE AND/OR HEALTH CARE POWER OF ATTORNEY: A person appointed under a Living Will Declaration or a Power of Attorney can make medical decisions on your behalf if you are unable to do so.