



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:

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## 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:

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Life Insurance Policies:

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Business Interests:

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Property Agreements:

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## 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?

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## 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](mailto: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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