

Estate Planning Checklist

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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 least 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 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 number and approximate value**

ii. "In trust for" accounts

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

d. Promissory notes and mortgages

e. Life insurance, annuities and employee benefits

f. Business interests

i. Proprietorship

ii. Professional practice

iii. Closely held business interests

vi. Partnership interest

- g. Real estate**
 - i. Principal residence**

- ii. Vacation residence**

- iii. Other residences**

- iv. Undeveloped property**

15. Liabilities

- a. Judgments**

- b. Bank loans**

- c. Promissory notes**

- d. Accounts payable**

- e. Loans**

- f. Accrued taxes**

16. Name, address and phone number of accountant
