PROBATE PLANNING WORKSHEET

Please Print

DATE ______/_____/_____

Full Legal Name: ____

Date of Death: __________________________________

Age: ____ Birthdate: _____/_____/_____ Social Security Number: _____-___-_______

Driver's License No.: ___________________________ State: _____________________

E-mail Address: _____________________________ cell phone: __________________

Marital Status: ___Married, ___Single, ___Divorced, ___Widowed

Home Address: ________________________

____

Home City/ST/Zip: _____________________

Home County: _________________________

Home Phone: __________________________

Fax for Confidential Info: _______________

Occupation: ___________________________

Full Name of Children and Mailing Addresses:	*Birthdate*	*Marital Status (M/S/D)*
1. _____________________________________	______/_____/______	____________
_____________________________________	SSN: ______________	
_____________________________________		
Spouse: ____________________________	______/_____/______	
2. _____________________________________	______/_____/______	____________
_____________________________________	SSN: ______________	
_____________________________________		
Spouse: ____________________________	______/_____/______	

3. ________________________________ ______/_____/______ ____________

________________________________ SSN: _______________

____

Spouse: __________________________ ______/_____/______

4. ________________________________ ______/_____/______ ____________

________________________________ SSN:_______________

____

Spouse: __________________________ ______/_____/______

Do you presently have a:

Safety Deposit Box	Yes/No	where located	__________________
Irrevocable Living Trust:	Yes/No	Date of Document:	___________
Living Trust?	Yes/No	Date of Document:	____________
Irrevocable Life Insurance Trust?	Yes/No	Date of Document:	____________
Will?	Yes/No	Date of Document:	____________
Power of Attorney?*	Yes/No	Date of Document:	____________
Health Care Power of Attorney (Living Will)?	Yes/No	Date of Document:	____________

*(*Include those for USDA or other government programs or purposes.)*

Please provide copies of the above documents so the attorney may review them.

Have you ever filed a Federal Gift Tax Return? ______

When and why? ____

____

Have you made any substantial gifts (over $13,000 in value) to anyone other than your spouse or a charity? ______

If yes, please indicate to whom, when, and what was the property given:

___

___

___

(Continue on back or additional sheets, if necessary.)

Please list the names and addresses of your Key Advisors (i.e., who advises you concerning property, investing, business, and taxes):

CPA: ___

___

Personal Bank & Banker: ___

___

Financial Advisor: ___

___

Insurance Agent: ___

___

Other: ___

___

Other: ___

___

ASSETS

Ownership and your best estimate of Fair Market Value. You might have already prepared a current balance sheet for a financial planner, bank, etc., in which case, you could be less detailed on this page and attach a copy of that balance sheet.

Real Estate (address):	**Joint**	**Husband/*Single***	**Wife**
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________

(Please bring a document (deed, abstract, etc.) showing legal description of each tract of real estate.)

Mineral Interests: _________ Yes _________ No
If Yes, please provide mineral deed.

Automobiles (Year, Make & Model):	**Joint**	**Husband/*Single***	**Wife**
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________

(Please bring a copy of all vehicle titles.)

Savings and Checking Accounts:	**Joint**	**Husband/*Single***	**Wife**
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________

(Attach additional page, if necessary.)

Notes Held by You (money owed to you by others):	**Joint**	**Husband/*Single***	**Wife**
________________________________	$_________	$__________	$_________
________________________________	$_________	$__________	$_________

	Joint	Husband/*Single*	Wife
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________

(Attach additional page, if necessary.)

Certificates of Deposit (CDs):	**Joint**	**Husband/*Single***	**Wife**
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________

Mutual Funds/Money Market/Stocks/ Bonds:	**Joint**	**Husband/*Single***	**Wife**
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________

(Attach additional page, if necessary.)

Valuable Personal Property (farm equipment, jewelry, collections, tools, etc.:	**Joint**	**Husband/*Single***	**Wife**
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________

(Attach additional page, if necessary.)

Other Miscellaneous Contents of Home:	**Joint**	**Husband/*Single***	**Wife**
________________________________	$__________	$__________	$__________
________________________________	$__________	$__________	$__________

______________________	$__________	$__________	$__________
______________________	$__________	$__________	$__________

LIFE INSURANCE

Insurance Co.	Insured	Policy Owner	Beneficiary	Death Benefit	Cash Value
________	________	________	________	$________	$________
________	________	________	________	$________	$________
________	________	________	________	$________	$________
________	________	________	________	$________	$________

RETIREMENT BENEFITS

Pension/Profit Sharing/401k/403b:	Owner	Beneficiary	Value
______________	__________	__________	$________
______________	__________	__________	$________
______________	__________	__________	$________

(Attach additional page, if necessary. Please bring a copy of the Summary Plan Description.)

INDIVIDUAL RETIREMENT ACCOUNTS

Invested at/through/in:	Owner	Beneficiary	Value
______________	__________	__________	$________
______________	__________	__________	$________
______________	__________	__________	$________
______________	__________	__________	$________

(Attach additional page, if necessary. Please bring a copy of the statement and the Custodial Agreement.)

OTHER ASSETS

Describe the Asset:	Owner	Value
____________________	____________________	$____________
____________________	____________________	$____________
____________________	____________________	$____________
____________________	____________________	$____________

(Attach additional page, if necessary.)

LIST OF LIABILITIES

Home Mortgage:	**Joint**	**Husband/*Single***	**Wife**
$____________________	$__________	$__________	$__________

Mortgage Holder: ____________________

Account No.: ____________________

Address: ____________________

Telephone: ____________________

	Joint	Husband/Single	Wife
Other Mortgage:	$__________	$__________	$__________
Notes (secured by: ______________):	$__________	$__________	$__________
Loans Against Life Insurance:	$__________	$__________	$__________

Other Obligations (credit cards, charge
Accounts, car loans, automatic withdrawls, etc):

$__________	$__________	$__________
$__________	$__________	$__________
$__________	$__________	$__________
$__________	$__________	$__________