
Estate Planning Detailed List

Providing the following information can help your attorney develop an appropriate estate plan for you, your spouse or significant other, and your heirs and beneficiaries.

1. Who Will Make Financial Decisions?

Who will make *financial* decisions for you, or both of you, if no one else is available? List the full name with middle initials, address, telephone number, and e-mail address for the first and second choice.

1. Name:

Address:

Telephone:

E-Mail:

2. Name:

Address:

Telephone:

E-Mail:

2. Who Will Make Medical Decisions?

Who will make your *medical* decisions (including, possibly, end-of-life decisions) if no one else is available? List the full name with middle initial, address, telephone numbers, and e-mail addresses for the first and second choice.

1. For You

Name:

Address:

Telephone:

E-Mail:

2. For You

Name:

Address:

Telephone:

E-Mail:

1. For Your Spouse or Significant Other

Name:

Address:

Telephone:

E-Mail:

2. For Your Spouse or Significant Other

Name:

Address:

Telephone:

E-Mail:

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3. Who Should Inherit Your Property?

Who will inherit your property? List the *percentage of your total estate* rather than specific assets. Include the full name with middle initial and relationship to each party.

Name	Relationship	%
A.		
B.		
C.		
D.		
E.		
F.		
G.		
H.		

4. If Your Heirs Predecease You

If any of your heirs predecease you, who should inherit their share of your estate? Name each heir and an alternate.

Heir	Alternate
A.	
B.	
C.	
D.	
E.	
F.	
G.	
H.	

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5. Caring for Minor Children

If there are minor children, who will raise them if both parents are deceased? List the full name including middle initial, address, telephone number, e-mail address, and personal relationship for each choice. List *individuals* rather than naming a couple.

1. Name:

Address:

Telephone:

E-Mail:

Relationship:

2. Name:

Address:

Telephone:

E-Mail:

Relationship:

6. At What Age Should Your Children or Young Adult Heirs Inherit Property?

This age may vary with the individual.

Name	Age to Inherit
A.	
B.	
C.	
D.	
E.	
F.	

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7. Real Estate

Do you own real estate? For each property, list the full address and attach a full copy of the most recent grant deed (not deed of trust), warranty deed, or quitclaim deed.

A.

B.

C.

D.

E.

F.

G.

8. Checking, Savings, and Brokerage Accounts

List each bank account, brokerage account, credit union account, or other financial account. Do not include any IRA, 401(k), or other retirement accounts. For each account attach a copy of a recent statement.

Company Name	Type of Account
A.	
B.	
C.	
D.	
E.	
F.	
G.	
H.	

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9. Retirement Accounts

List all IRA, 401(k), stock savings plans, or similar retirement accounts. For each account, attach a copy of a recent statement and a blank Change of Beneficiary form.

Firm Name	Type of Account
A.	
B.	
C.	
D.	
E.	
F.	
G.	
H.	

10. Life Insurance Policies

List all life insurance policies, including those provided through an employer. Include the company name, insured, policy number, and the face amount of insurance. For each policy, attach a copy of the first page, or declaration page, and a blank Change of Beneficiary form.

Company Name	Insured	Policy Number	Face Amount
A.			
B.			
C.			
D.			
E.			
F.			
G.			
H.			

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11. Annuities

Do you own any annuities? If so, please list the annuity below. Attach a copy of the first page of the annuity and a blank Change of Beneficiary form.

A.

B.

C.

D.

E.

12. Other Assets

Do you own any other assets that you have not already listed? This may include assets such as art, antiques, a business interest, collectibles (stamps, coins, or precious metals), intellectual property (domain names, copyrights, patents, trademarks, or royalties), vehicles such as valuable cars, boats, or airplanes, or debts owed to you by others.

A.

B.

C.

D.

E.

F.

G.

If Additional Space is Needed.....

If additional space is needed, please add extra sheets and number your answers using the same numbering sequence used in this form.

Disclosure Notice

The information that follows is intended to serve as a basis for further discussion with your financial, legal, tax and/or accounting advisors. It is not a substitute for competent advice from these advisors. The actual application of some of these concepts may be the practice of law and is the proper responsibility of your attorney. The application of other concepts may require the guidance of a tax or accounting advisor. The company or companies listed below are not authorized to practice law or to provide legal, tax, or accounting advice.

Although great effort has been taken to provide accurate data and explanations, and while the sources are deemed reliable, the information that follows should not be relied upon for preparing tax returns or making investment decisions. This information has neither been audited by nor verified by the company, or companies, listed below and is therefore not guaranteed by them as to its accuracy.

If a numerical analysis is shown, the results are neither guarantees nor projections, and actual results may differ significantly. Any assumptions as to interest rates, rates of return, inflation, or other values are hypothetical and for illustrative purposes only. Rates of return shown are not indicative of any particular investment, and will vary over time. Any reference to past performance is not indicative of future results and should not be taken as a guaranteed projection of actual returns from any recommended investment.