A Guide to Preparing Your Estate Plan

Date information was provided: ____________________

Do you have a will in force? ______ If so, where is your will located? ____________________

Do you have a trust? ______ If so, with whom? ____________________

1 Personal Information

A. You

Full Name ____________________ Social Security Number ____________________

Address ____________________ Home Phone ____________________

Name of Business/Place of Employment ____________________

Business Address ____________________ Business Phone ____________________

Date & Place of Birth ____________________

B. Your Spouse

Full Name ____________________ Social Security Number ____________________

Address ____________________ Home Phone ____________________

Name of Business/Place of Employment ____________________

Business Address ____________________ Business Phone ____________________

Date & Place of Birth ____________________

C. Children (Grandchildren, if applicable)

Name	Relation	Date of Birth	Address	Phone

2 Business and Financial Counselors

	Name of Firm	Contact Person	Address	Phone
Accountant				
Attorney				
Life Ins. Agent				
Stock Broker				
Trust Officer				
Other				
Other				

3 Present Inventory of Your Estate

When you inventory your estate, try to be detailed and accurate with the market value of your assets. This will assist your estate planner in determining the best estate plan to fit your personal needs.

A. Life Insurance (including insurance provided by your employer)

Name of Insured	Owner	Beneficiary	Company/Policy #	Face Value

B. Retirement Plan (Pension, Profit-sharing, Keogh, I.R.A., etc.)

	Name of Plan	Name of Administrator and/or Trustee	Beneficiary	Current Value
Pension				
Profit Sharing				
Keogh				
E.S.O.P.				
I.R.A.				
S.E.P.				
Def. Comp.				
Other				

3

Present Inventory of Your Estate
continued

C. Assets (List all of your assets, such as: real estate, household furnishings, autos, jewelry, valuable collections, bank accounts, bonds, stocks, business interests, annuities, and any other property.)

Items	Current Market Value	Original Cost	Location	Ownership
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		
	$	$		

D. Estimated Debts and Mortgages Against Your Estate (excluding ordinary household expenses)

Debt or Mortgage With	Present Balance
	$
	$
	$
	$

C. Do you have a prearranged funeral agreement with a funeral director?

Name of funeral director: ______________________________

4

Distribution of Your Estate

A. Do you have any specific items that you want to be given to specific individuals?
If you prefer, your estate planning documents may contain a reference to a separate list concerning the distribution of personal property.

Person	Property or Article Bequeathed

If you prefer to leave a separate list, please check here: ☐

B. Do you wish a charitable organization to share in your estate?

Name/Address of Organization	Property/Market Value	Amount or Percent
	$	%
	$	%
	$	%

C. Describe in your own words how you wish the balance of your estate distributed:

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Distribution of Your Estate *continued*

D. Do you wish the balance of your estate to go into trust to benefit certain people or organizations? ☐ Yes ☐ No

If yes, whom should the trust benefit? ☐ Spouse ☐ Children ☐ Grandchildren

☐ Organization: ____________________

☐ Other: ____________________

Name of trustee ____________________

Successor trustee ____________________

If you desire to name co-trustees, please explain: ____________________

____

5

Guardian for Minor Children

Primary name ____________________

Address ____________________

Secondary name ____________________

Address ____________________

6

Personal Representative of Your Estate

Name of trust department or individual to act as personal representative of your estate:

Primary Name ____________________

Address ____________________

Secondary Name ____________________

Address ____________________

7

Other Pertinent Information

____

____

____

____

____

Use back panel if additional space is needed.

If you have any questions or concerns, please review this form with one of our trust administrators. Remember, this is not a will. This is a guide to having your estate planning documents drafted.

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