

ESTATE PLANNING SUMMARY FORM

DATE: _____

I. FAMILY INFORMATION (USE BACK OF PAGE FOR ADDITIONAL DATA)

A. Information about you:

Your Name _____

(Name used in business transactions, bank accounts, etc.)

Telephone Number: _____

Home _____

Work _____

Mailing Address:

Street/P.O. Box _____

Town _____

Zip Code _____

County _____

Social Security# _____

Date of Birth _____

Date & Place of Marriage _____

Occupation _____

B. Information about your spouse

Name _____

Social Security# _____

Date of Birth _____

Occupation _____

C. Information about your children:

Name

Address

Date of Birth (If under 18)

D. Information about your grandchildren:

Name

Address

Date of Birth (If under 18)

E. If you have no spouse, children or grandchildren, please list your nearest relatives and their addresses: (INDICATE RELATIONSHIP)

Name	Address	Relationship
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

F. If minor children, please provide name and address of Proposed Guardian (s) and Alternate guardian (s):

1st: _____

2nd: _____

G. Proposed Executor (s) name and address:

1st: _____

2nd: _____

H. Proposed Trustee (s) and address:

1st: _____

2nd: _____

II. ASSET INVENTORY (USE BACK OF PAGE FOR ADDITIONAL ASSETS)

A. Bank Accounts:	APPROXIMATE VALUES	
	Name of Bank \$	
Your Name _____	_____	_____
Spouse's Name _____	_____	_____
Joint Name _____	_____	_____

B. Life Insurance
(Please include Group Insurance)

Company	Face Amount	Beneficiary
1) _____	_____	_____
2) _____	_____	_____
3) _____	_____	_____

C. Stock:

Number of Shares	Company	Value
1) _____	_____	\$ _____
2) _____	_____	\$ _____
3) _____	_____	\$ _____
4) _____	_____	\$ _____
5) _____	_____	\$ _____

D. Real Estate residence and investment property
(Indicate amount of mortgage, if any in Section 111(C))

Location:	Value
1) _____	\$ _____
2) _____	\$ _____

E. Notes owed to you and Bonds (Include U.S. Bonds)

Name of Marker of Issuer:	Face amount of notes or bonds
1) _____	\$ _____
2) _____	\$ _____
3) _____	\$ _____

F. Personal Property

1) Contents of residence	\$ _____
2) Coin, stamp or similar collection	\$ _____
3) Paintings, Silver	\$ _____
4) Jewelry	\$ _____
5) Furs	\$ _____
6) Car (s)	\$ _____

G. Business Interests

Name & Address of Business

Yours _____

Spouse _____

Value of interest \$ _____ \$ _____ \$ _____ % of Total

Names (s) of other Partners or shareholders:

Description of any Buy-Sell, stock redemption,
or other agreements affecting value of interest (describe)

Value/Per Agreement

**H. Rights under Employee Benefit Plan
(Pension, Profit- Sharing or Stock Bonus Plan)**

Name of Beneficiary: _____

I. Rights under existing Estates & Trusts, includes Powers of Appointment

J. Expected Inheritance (s) _____

GROSS ESTATE - Yours _____

GROSS ESTATE - Spouse _____

TOTAL	Joint Property	
	1) With Spouse	\$ _____
	2) With others	\$ _____

III. LIABILITIES

A. Accounts Payable-Credits \$ _____ \$ _____

B. Long Term Debt \$ _____ \$ _____

C. Mortgage (s) \$ _____ \$ _____

Total Liabilities \$ _____ \$ _____

NET ESTATE; BEFORE EXPENSES, FEES AND ESTATE TAXES \$ _____ \$ _____

IV. LOCATION OF SAFE DEPOSIT BOX (any)

V. PRIOR MARRIAGES (ANY)

Provisions for former spouse under Separation Agreement or Decree of Divorce.

VI. WILL PROVISIONS

List proposed Legatees of items of tangible personal property or cash, devisees of real estate, indicating item, amount or percentage of estate, as to real property, state location and nature of real property, e.g., house, cottage, etc.

VII. ANY PRIOR WILLS? WHERE LOCATED

VIII. POWER OF ATTORNEY

XI. HEALTHCARE PROXY