

ESTATE PLANNING INVENTORY

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Family Information

Name _____ Age _____

Home Address _____

Spouse's Name _____ Age _____

Home Address _____

Children

Name _____ Age _____

Address _____

Name _____ Age _____

Address _____

*Additional children attach separate sheet

Heirs of any Deceased Child

Child Deceased _____

Grandchild _____ Age _____

Address _____

Grandchild _____ Age _____

Address _____

*Additional heirs attach separate sheet

Previous Marriage

Former Spouse_____

Date and place of divorce_____

Business Information

Occupation_____

Address_____

Social Security Number_____

Self Employed/Partnership_____

Buy-Sell Agreement_____

Financial Institutions

Bank_____

Checking_____

Savings_____

Savings and Loan Association_____

Checking_____

Savings_____

Safe Deposit Box_____

Stocks_____

Bonds_____

Notes Receivable_____

Accounts Receivable_____

Unsecured Notes_____

Life Insurance _____

Policy Name and Number _____

Address _____

Policy Name and Number _____

Address _____

Personal Property (value and mortgages if applicable)

Automobile _____

Furniture _____

Office Equipment _____

Equipment _____

Other _____

Real Property (value and mortgage if applicable)

(Copy of legal description)

Address _____ (type ownership)

Mortgaged to _____

Address _____ (type ownership)

Mortgaged to _____

Address _____ (type ownership)

Mortgaged to _____

Miscellaneous (not previously listed)

Assets _____

Liabilities

Federal taxes _____

State taxes _____

Local taxes _____

Real estate taxes _____

Personal property taxes _____

Trusts _____

Interest _____

Net Estate Value:

\$

Value of estate passing outside inheritance including
real estate, joint tenancies with right of survivorship,
joint bank accounts and life insurance paid

\$

Total net estate

\$ _____

Executor/Personal Representative

Name _____ Age _____

Address _____

City, State _____

Business phone _____ Home phone _____

Relationship _____

Alternate Executor/Personal Representative

Name _____ Age _____

Address _____

City, State _____

Business phone _____ Home phone _____

Relationship _____

Administrator

Name _____ Age _____

Address _____

City, State _____

Business phone _____ Home phone _____

Relationship _____