

ESTATE PLANNING INFORMATION

Last name First name M.I. S.S. Number Date of birth

Last name (spouse) First name M.I. S.S. Number Date of birth

Street address City State Zip Code

County Phone Numbers / (home/work/cell)

Children:

1. _____
Name Phone Number (DOB)

Address

2. _____
Name Phone Number (DOB)

Address

3. _____
Name Phone Number (DOB)

Address

4. _____
Name Phone Number (DOB)

Address

DISTRIBUTION OF ESTATE

To Spouse, then to children equally, or issue per stirpes? Yes _____ No _____

If no, explain distribution: _____

Specific Bequests/Devises: _____

Wife:

1. Initial _____
Name/Relationship Phone Number

Address

2. Alternate _____
Name/Relationship Phone Number

Address

3. Second
Alternate _____
Name/Relationship Phone Number

Address

Special Powers (if any): _____

LIVING WILL:

Notice to:

Husband:

1. Initial _____
Name/Relationship Phone Number

Address

2. Alternate _____
Name/Relationship Phone Number

Address

3. Second
Alternate _____
Name/Relationship Phone Number

Address

Wife:

1. Initial _____
Name/Relationship Phone Number

Address

2. Alternate _____
Name/Relationship Phone Number

Address

3. Second Alternate _____
Name/Relationship Phone Number

Address

DURABLE POWER OF ATTORNEY FOR HEALTH CARE:

Husband:

1. Initial _____
Name/Relationship Phone Number

Address

2. Alternate _____
Name/Relationship Phone Number

Address

3. Second Alternate _____
Name/Relationship Phone Number

Address

Wife:

1. Initial _____
Name/Relationship Phone Number

Address

2. Alternate _____
Name/Relationship Phone Number

Address

3. Second Alternate _____
Name/Relationship Phone Number

Address

Real Estate:

| | <u>Location</u> | <u>Approx. Value</u> | <u>Mrtg./Ownership</u> |
|------------|-----------------|----------------------|------------------------|
| Residence: | _____ | _____ | _____ |
| Other: | _____ | _____ | _____ |
| | _____ | _____ | _____ |

Life Insurance/Annuities/IRA:

| <u>Institution</u> | <u>Type</u> | <u>Face value</u> | <u>Ownership</u> |
|--------------------|-------------|-------------------|------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Prepared By:

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