



ESTATE PLANNING INFORMATION SHEET

NAME(S):

ADDRESS:

PHONE:

EMAIL:

ASSET VALIDATION

REAL ESTATE: Fair Market Value of all real estate and the amount of any encumbrances; ownership

OTHER PERSONAL PROPERTY: Securities, jewelry, art work, bank accounts, autos, boats, airplanes, etc.

INSURANCE POLICIES: Face value of policy, owner, beneficiary, type of policy:

CHILDREN: Full name(s) and birth dates

GUARDIAN AND CONTINGENT GUARDIAN: Full name(s), addresses and phone numbers

EXECUTOR AND CONTINGENT EXECUTOR: Full name(s), addresses and phone numbers

SURETY to be waived on bond of Guardian?

Executor?

PRIMARY DISTRIBUTION:

CONTINGENT DISTRIBUTION:

ULTIMATE DISTRIBUTION:

TRUST ARRANGEMENTS, IF ANY

MISCELLANEOUS INFORMATION:

ADVANCE DIRECTIVES: