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**ESTATE PLANNING
INFORMATION LIST**

Date Completed: _____

1. **Full legal name:** _____ SS#: _____
Current Address: _____
Home Phone: (____) _____ Work Phone: (____) _____
Other names used? _____
Date of Birth: _____ City/State where Born: _____
If born out of state, number of years in this state: _____
Living Parents (full names of both) _____
Address: _____
Siblings: _____

2. **Spouse Information:**
Spouse's full legal name: _____ SS#: _____
Other names used? _____
Work Phone: (____) _____
Date of Birth: _____ City/State where Born: _____
If born out of state, number of years in this state: _____
Living Parents (full names of both) _____
Address: _____
Siblings: _____

3. **Children/Dependents:**
List full names of living children and date of birth below. If step children, indicate who is natural parent in parenthesis.

<u>Name</u>	<u>Date of Birth</u>
_____	_____
_____	_____
_____	_____

(If additional space is needed, use back side of this page.)

If minor children, list name, current address and phone number of **guardian** (custodian):
1st Choice: _____
2nd Choice: _____

For asset management for minor children, list name, current address and phone number of **Trustee** (guardian of the estate):

1st Choice: _____

2nd Choice: _____

Any dependents in addition to those listed above? _____ If yes, list below:

Full Name: _____ Date of Birth: _____

Relationship? _____

4. Grandchildren:

List full names of grandchildren, date of birth, and current address if to be named in will.

5. Personal Representative (Executor or Executrix)

List full name of person or institution to administer the estate (Indiana resident preferred)

6. Indicate any specific bequests: items or money to be left to specific individual(s):

7. Gifts to Church or Charity? _____

8. Have any prior gift tax returns been filed? _____

9. Miscellaneous Information:

Old Will? _____ Where located? _____

Any previous Trust Agreements? _____ Where located? _____

Living Will? _____

Power of Attorney? _____

Healthcare Representative Appointment? _____

Do you have a safe deposit box? _____ If yes, list location and box number: _____

FINANCIAL INFORMATION: (To be used in trust and estate planning)

1. Assets:

A. Cash accounts (savings, checking, CD's):

<u>Institution</u>	<u>Amount</u>	<u>Ownership (Circle)</u>
_____	\$ _____	H W Joint
_____	\$ _____	H W Joint
_____	\$ _____	H W Joint
_____	\$ _____	H W Joint

B. Real Estate:

Residence: _____

Current Value: \$ _____

Mortgage: _____

Ownership: (circle one) H W Joint

Vacation home or investment real estate? _____

Location: _____

Current Value: \$ _____

Mortgage: _____

Ownership: (circle one) H W Joint

C. Publicly traded stock, bonds and securities:

<u>Company</u>	<u>Date Original Acquired</u>	<u>Cost</u>	<u># Shares</u>	<u>Ownership</u>
_____				H W Joint
_____				H W Joint
_____				H W Joint
_____				H W Joint
_____				H W Joint
_____				H W Joint

D. Closely held business stock, partnership interests, etc.:

<u>Company</u>	<u>Date Acquired</u>	<u>Original Cost</u>	<u># Shares</u>	<u>Ownership</u>
_____				H W Joint
_____				H W Joint
_____				H W Joint
_____				H W Joint
_____				H W Joint

E. Employee retirement plan benefits:

<u>Company</u>	<u>Date Acquired</u>	<u>Original Cost</u>	<u># Shares</u>	<u>Ownership</u>		
_____				H	W	Joint
_____				H	W	Joint
_____				H	W	Joint

F. Life Insurance:

<u>Insured</u>	<u>Company</u>	<u>Type</u>	<u>Amount</u>	<u>Owner</u>	<u>Beneficiary</u>
_____			\$ _____		
_____			\$ _____		
_____			\$ _____		
_____			\$ _____		

G. Tangible personal property:

	<u>Current Value</u>
Household goods/furniture	\$ _____
Automobiles	\$ _____
Collections/Jewelry	\$ _____

H. List any notes, mortgages and/or people who owe you money.

2. Debts, Liabilities and Obligations:

Itemize any significant debts, liabilities, and obligations not listed above, including any contingent liabilities such as guaranties.

<u>Institution</u>	<u>Amount Due</u>	<u>Ownership</u>		
_____		H	W	Joint
_____		H	W	Joint
_____		H	W	Joint
_____		H	W	Joint