

Estate Planning Checklist

This comprehensive checklist will help you collect the necessary information to plan your estate.

Personal and Family Information

List the names exactly as you wish them to appear in your estate planning documents.

Your Name:

Your Date of Birth:

Your Spouse's Name:

Your Spouse's Date of Birth:

Home Address:

Telephone Number:

Are you a United States citizen?

If not, what country are you a citizen of?

Is your spouse a United States citizen?

If not, what country is your spouse a citizen of?

For each child, list the following:

Name:

Date of Birth:

Is the child adopted? If so, when and where were they adopted?

Is the child deceased? If so, when did they die?

Is the child yours from a previous marriage or your spouse's from a previous marriage?

Name of Spouse:

Name of Child and Date of Birth:

If you or your spouse have been married before, list the following:

Name:

Address (if living):

If you or your spouse have been divorced, provide a copy of the divorce decree.

Does a member of your family have a disability or require special care? If so, who and what do they need?

Residences

Personal residence:

Address:

Is it single family, condo, or co-op:

How do you hold title?

Joint tenancy with right of survivorship

Tenancy by the entirety

Tenancy in common

Your name only

Spouse's name only

Other

Fair market value:

Mortgage balance, if any:

Mortgage life insurance:

List the same for any other personal residences or vacation homes.

Personal and Household Effects

For each of the following categories provide an estimate of the value and who owns it. Provide any additional details as needed.

Automobiles:

General personal and household effects:

Furniture:

Furnishings:

Books:

Pictures (of no special value):

Music (CDs, records, tapes):

DVDs:

Valuable jewelry and if insured:

Valuable works of art and if insured:

Valuable antiques and if insured:

Other valuable collections such as stamps, coins, etc.:

Anything else:

Cash, cash deposits, and cash equivalents

For each checking account, money market account, savings account, certificates of deposit, and T-bills (short-term U.S. obligations) provide the following information:

Name of bank or institution:

Address of bank or institution:

Who owns it? You, your spouse, or jointly? If jointly, who with (if not your spouse)?

Pension & profit-sharing plans, IRAs, ESOPs or other tax-qualified employee-benefit plans

Provide the following information for each plan you or your spouse participate in.

You:

Vested:

Current Value:

Primary and contingent beneficiaries:

Your Spouse:

Vested:

Current Value:

Primary and contingent beneficiaries:

Life Insurance on your life

Ordinary life insurance:

Company name:

Company address:

Policy number:

Face amount of policies:

If you don't own it, who does?

Primary and contingent beneficiaries:

Cash value:

Loans, if any, against it:

Amount of accidental death benefits, if any:

Term or group term life insurance

Company name:

Company address:
Policy number:
Face amount of policies:
If you don't own it, who does?
Primary and contingent beneficiaries:
Amount of accidental death benefits, if any:

Provide the same information for any other life insurance policies or insurance that has life insurance features.

Life Insurance on your spouse's life

Ordinary life insurance:
Company name:
Company address:
Policy number:
Face amount of policies:
If your spouse doesn't own it, who does?
Primary and contingent beneficiaries:
Cash value:
Loans, if any, against it:
Amount of accidental death benefits, if any:

Term or group term life insurance
Company name:
Company address:
Policy number:
Face amount of policies:
If your spouse doesn't own it, who does?
Primary and contingent beneficiaries:
Amount of accidental death benefits, if any:

Provide the same information for any other life insurance policies or insurance that has life insurance features.

Investment Assets

For publicly traded stocks and corporate bonds, municipal bonds, long-term U.S. Treasury Notes and Bonds, limited partnership interests provide the following information. Include the approximate value.

You own:

Your spouse owns:

Owned jointly with your spouse:

Owned jointly with someone else:

For any other investments not covered in the above list, describe the investment and its value.

Other Data

You will also need to collect any other data that pertains to your assets, income, and possible future income. You may have other data that hasn't been covered in this checklist.