



**ESTATE PLANNING WORKSHEET (joint)**

TODAY'S DATE: \_\_\_\_\_ HOME PHONE: \_\_\_\_\_

CELL PHONE: \_\_\_\_\_

HUSBAND NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ SOCIAL SECURITY NUMBER: \_\_\_\_\_

WIFE NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ SOCIAL SECURITY NUMBER: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

HUSBAND EMPLOYMENT: \_\_\_\_\_

WIFE EMPLOYMENT: \_\_\_\_\_

PREVIOUS WILL PREPARED BY AND WHERE: \_\_\_\_\_

WHEN: \_\_\_\_\_; CODICIL (S): \_\_\_\_\_; TRUST: \_\_\_\_\_; COPY ATTACHED: \_\_\_\_\_

OTHER ESTATE PLANNING DOCUMENTS AND/OR MARITAL AGREEMENTS:

DATE MARRIED: \_\_\_\_\_ PLACE MARRIED: \_\_\_\_\_

PREPAID FUNERAL: YES \_\_\_ NO \_\_\_ IF YES \_\_\_\_\_

ANY LONG-TERM CARE ARRANGEMENTS: \_\_\_\_\_

**CHILDREN OF THIS MARRIAGE:**

(This information is necessary regardless of whether or not you want the following individuals named in your documents.)

Name:

Date of Birth:

Social Security Number:

(1) \_\_\_\_\_  
Address: \_\_\_\_\_

(2) \_\_\_\_\_  
Address: \_\_\_\_\_

(3) \_\_\_\_\_  
Address: \_\_\_\_\_

(4) \_\_\_\_\_  
Address: \_\_\_\_\_

**HUSBAND'S CHILDREN OF FORMER MARRIAGE:**

(This information is necessary regardless of whether or not you want the following individuals named in your documents.)

Name:

Date of Birth:

Social Security Number:

(1)

Address: \_\_\_\_\_

(2)

Address: \_\_\_\_\_

(3)

Address: \_\_\_\_\_

**WIFE'S CHILDREN OF FORMER MARRIAGE:**

(This information is necessary regardless of whether or not you want the following individuals named in your documents.)

Name:

Date of Birth:

Social Security Number:

(1)

Address: \_\_\_\_\_

(2)

Address: \_\_\_\_\_

(3)

Address: \_\_\_\_\_

**GRANDCHILDREN:**

(This information is necessary regardless of whether or not you want the following individuals named in your documents.)

Grandchild's Name:

Date of Birth:

Parent's Name:

(1)

Address: \_\_\_\_\_

(2)

Address: \_\_\_\_\_

(3)

Address: \_\_\_\_\_

(4)

Address: \_\_\_\_\_

(5)

Address: \_\_\_\_\_

(6)

Address: \_\_\_\_\_

(7)

Address: \_\_\_\_\_

## INVENTORY OF ASSETS:

Residence: \_\_\_\_\_  
 Mortgage Info: \_\_\_\_\_

Other Real  
 Property: \_\_\_\_\_  
 Mortgage Info: \_\_\_\_\_

Furnishings: \_\_\_\_\_  
 Collectibles: \_\_\_\_\_  
 (jewelry, art, stamps, coins)

Automobiles: (1) \_\_\_\_\_  
 (2) \_\_\_\_\_

<u>BANK NAME:</u>	<u>VALUE:</u>	<u>DATE OPENED:</u>	<u>HOW IS THIS TITLED?</u> (Husband, Wife, or Joint)
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Checking:			
Savings:			
Certificates of Deposit:			
Life Insurance:			
Stocks, Bonds, and Brokerage: (non retirement)			
Stocks, Bonds, and Brokerage: (retirement-IRA)			
Stocks, Bonds, and Brokerage: (retirement-IRA)			
Stocks, Bonds, and Brokerage: (pension/401K)			
Stocks, Bonds, and Brokerage: (pension/401K )			
Miscellaneous:			

Digital Info: \_\_\_\_\_

**TOTAL VALUE OF JOINT GROSS ESTATE:** \$ \_\_\_\_\_