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**ESTATE PLANNING WORKSHEET (single)**

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

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

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

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

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

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

FORMER SPOUSE: \_\_\_\_\_

MARRIAGE ENDED BY: \_\_\_\_\_ ON: \_\_\_\_\_

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

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

OTHER ESTATE PLANNING DOCUMENTS:  
 \_\_\_\_\_

PREPAID FUNERAL: \_\_\_\_\_ LONG TERM CARE INS.: \_\_\_\_\_

**MISCELLANEOUS:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**CHILDREN:**

(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: \_\_\_\_\_

(5) \_\_\_\_\_

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

(6) \_\_\_\_\_

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: \_\_\_\_\_

## 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</u> <u>OPENED:</u>	<u>HOW IS THIS TITLED?</u> (e.g. self; joint with ?)

Checking:			
Savings:			
Certificates of Deposit:			
Life Insurance:			
Stocks, Bonds, and Brokerage: (non retirement)			
Stocks, Bonds, and Brokerage: (retirement-IRA)			
Stocks, Bonds, and Brokerage: (pension/401K)			
Miscellaneous:			

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

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