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ESTATE PLANNING WORKSHEET (JOINT)

TODAY'S DATE: _____ HOME PHONE: _____

HUSBAND NAME: _____

DATE OF BIRTH: _____ SOCIAL SECURITY NUMBER: _____

WIFE NAME: _____

DATE OF BIRTH: _____ SOCIAL SECURITY NUMBER: _____

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:

Name:

Date of Birth:

Social Security Number:

(1) _____

Address: _____

(2) _____

Address: _____

(3) _____

Address: _____

(4) _____

Address: _____

HUSBAND'S CHILDREN OF FORMER MARRIAGE:

Name:

Date of Birth:

Social Security Number:

(1) _____
Address: _____

(2) _____
Address: _____

(3) _____
Address: _____

WIFE'S CHILDREN OF FORMER MARRIAGE:

Name:

Date of Birth:

Social Security Number:

(1) _____
Address: _____

(2) _____
Address: _____

(3) _____
Address: _____

GRANDCHILDREN:

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>NAME:</u>	<u>VALUE:</u>	<u>DATE OPENED:</u>	<u>HOW IS THIS TITLED?</u> (Husband, Wife, or Joint)
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:			

TOTAL VALUE OF JOINT GROSS ESTATE: \$ _____