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ESTATE PLANNING WORKSHEET (SINGLE)

TODAY'S DATE: _____ HOME PHONE: _____

NAME: _____

DATE OF BIRTH: _____ SOCIAL SECURITY NUMBER: _____

ADDRESS: _____

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: YES ____ NO ____ IF YES _____

ANY LONG-TERM CARE ARRANGEMENTS: _____

MISCELLANEOUS:

CHILDREN:

Name:

Date of Birth:

Social Security Number:

(1) _____
Address: _____

(2) _____
Address: _____

(3) _____
Address: _____

(4) _____
Address: _____

(5) _____
Address: _____

(6) _____
Address: _____

GRANDCHILDREN:

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>COMPANY NAME:</u>	<u>VALUE:</u>	<u>DATE OPENED:</u>	<u>HOW IS THIS TITLED?</u> (e.g. 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: (pension/401K)				
Miscellaneous:				

TOTAL VALUE OF GROSS ESTATE: \$ _____