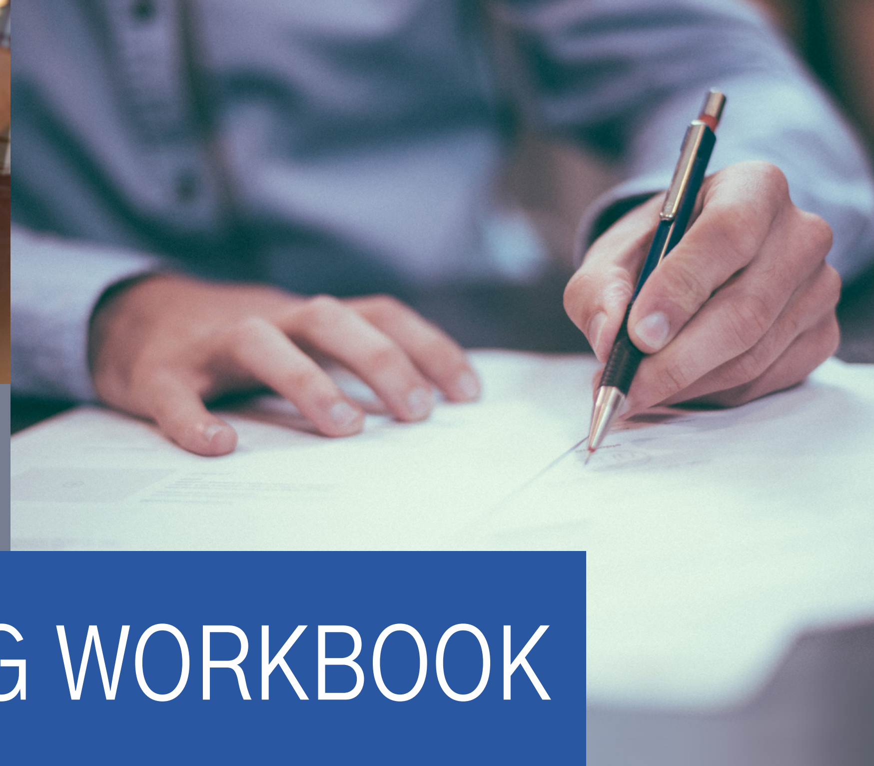



WE ARE PLEASED TO OFFER YOU THIS WORKBOOK, DESIGNED TO HELP YOU GATHER AND ORGANIZE ALL PERTINENT ESTATE PLANNING INFORMATION IN ONE PLACE.



ESTATE PLANNING WORKBOOK








Estate Planning Workbook

Introduction

Many people know the importance of having an estate plan, yet they do not maintain a current Will that reflects their present wishes. Planning and preparing ahead of time, and reviewing your estate plan regularly can prevent misunderstandings later and allows for your survivors to sort through complex issues with greater ease, clarity, and hopefully, harmony. To assist with your estate planning, National Legal Solutions Center is pleased to offer you this Estate Planning Workbook, designed to help you gather and organize all pertinent estate planning information in one place.

Through thoughtful planning, you can be assured that your wishes for your property and other assets, custody for minor children, and any other specific requests you define will be carried out according to your plan. It's also the best way to ensure that your philanthropic values will be administered according to your wishes, and that your legacy will continue fo generations to come.

Table of Contents

You and Your Family

Your Personal Information:

Date ____

Your Full Legal Name ____

Date of Birth ___________ Gender: o Male o Female

Present Marital Status:

o Married o Single o Divorced o Legally Separated o Widowed

If you are widowed, what date did this occur? ____

Home Address ____

City __________________________ State _______________ Zip _____________________________

Home Phone ( ) ____

Work Phone ( ) ____

Mobile Phone ( ) ____

E-mail ____

Employer ____

Retired ____

Job Title ____

You and Your Family

Your Spouse:

Spouse's Full Legal Name ____

Date of Birth _____________ Gender: o Male o Female

Present Marital Status:

o Married o Single o Divorced o Legally Separated o Widowed

Home Address ____

City ______________________ State _____________ Zip ________________________

Home Phone ( ) ____

Work Phone ( ) ____

Mobile Phone ( ) ____

E-mail ____

Employer/Retired ____

Job Title ____

Nearest Relatives

List in Order
1. Children 2. Grandchildren 3. Brothers and/or Sisters 4. Parents 5. Nieces and/or Nephews

Name	Relationship	Date of Birth	Address

Property Assets

Real Estate Owned (Main Residence/Second Residence/Vacation Home)

Property Type & Location	Cost When Acquired	Title*	Current Value	Debt/Lender

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Personal Property

Type of Property	Title*	Cost Basis	Date of Investment	Current Value
Furniture/Household Furnishings				$
Jewelry				$
Antiques/ Collections				$
Tools & Equipment				$
Musical Instruments				$
Automobiles				$
				$

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Financial Assets

Investments
(Cash, Bank Accounts, Stocks, Bonds, Certificates of Deposit, Mutual Funds, etc.)

Name of Bank/Broker	Cash Amount	Stock Value	Mutual Fund Value	CD Value

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Location of any Stock Certificates, Bonds, Options, etc., that are not held in Brokerage Accounts

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Safe Deposit Boxes

Box Location	Box #	Location of Keys	Names of Others with Authorized Access

Insurance

Life Insurance you own (on your own life)

Company	Type of Policy	Beneficiary	Amount
			$
			$
			$
			$
			$

Companies or Organizations that own insurance policies on your life

Company	Type of Policy	Beneficiary	Amount
			$
			$
			$

Insurance owned by you on the lives of others

Company	Type of Policy	Policy #	Coverage
			$
			$
			$

Location of Life Insurance Policies

____

____

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____

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Other Insurance

Company	Type of Policy	Policy #	Coverage
			$
			$
			$
			$

Benefits

Individual Retirement Accounts, Pensions, Retirement or Death Benefit Plans

Fund Name & Company	Account #	Beneficiary	Telephone	Amount
				$
				$
				$
				$
			Total	$

Location of any employment contracts or business agreements relating to interests in corporations, partnerships and sole proprietorships

____

____

____

What you owe

Mortgage/Auto/Installment Contracts/Charge Accounts/Other Loans

To Whom Debt or Mortgage is Owed	Address	Payment Date	Current Amount Owed
			$
			$
			$
			$
			$
		Total Approximate Indebtedness $	

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Money owed to you

Money invested in Mortgages, Personal Loans Trust Deeds

With Whom & Address	Cost When Acquired	Title*	Current Value
			$
			$
			$
			$
			$
			$
			$

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

o I am currently o I expect to be the beneficiary of a bequest.

Testator's Name ______________________________

Approximate value $ ______________________________

Total approximate value of estate $ ______________________________

o I am currently o I expect to be the beneficiary of other income or assets.

Source's Name ______________________________

Approximate value $ ______________________________

Trusts

Location of any trusts and any amendments to trusts that you have created or under which you are a beneficiary and names of trustees.

Name ____ Telephone ______________________

Address ____

Tax Records

Location of tax records

Name ____ Telephone ______________________

Address ____

Key Contacts

Executor

Name ____ Telephone ______________________

Address ____

Alternate Executor

Name ____ Telephone ______________________

Address ____

Guardian for Your Children

Name ____ Telephone ______________________

Address ____

Alternative Guardian for Your Children

Name ____ Telephone ______________________

Address ____

Trustee for Children's Interest

Name ____ Telephone ____________________

Address ____

Your Accountant

Name ____ Telephone ____________________

Address ____

Your Attorney

Name ____ Telephone ____________________

Address ____

Your Financial Planner

Name ____ Telephone ____________________

Address ____

Your Faith Based Institution

Name ____ Telephone ____________________

Address ____

Plan Your Estate Distribution

You do not need to describe every item of your personal or real property in your will. However, if there is some specific asset that you want to go to a certain individual, list it here. You may include individuals, other than nearest relatives, whom you wish to include in your estate planning. Also, if you wish to leave a specific sum of money to a person or charity, state the amount and the name.

Person/Charity	Address	Relationship	Item, Property, or Sum of Money	Locations of Asset

After the specific bequests (if any), the simplest way to divide the residue of your estate is by percentages. Name the person or charity you wish to remember, and then state what percentage of the total remaining amount of your estate each is to receive.

______________________________ ______________________ %

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Arrangements

Location of living will, durable power of attorney for health, medical directives order or other powers of attorney:

My preferred funeral and burial instructions are:

Letter of Last Instructions

You may wish to write a letter of last instructions to your surviving spouse or other persons. This letter is not legally binding, as a will is meant to be, but it can be of great help. It allows you to communicate, informally and personally, helpful information or specific instructions, such as:

- Location of your will, safety deposit boxes, important papers, and records
- Digital, social media or online presence: account locations, names and passwords
- Names and addresses of persons to help surviving spouse
    - Names, addresses, and telephone numbers of individuals you wish to be notified of your death
- Funeral and burial instructions

Notes