Complete Estate Planning

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ESTATE ADMINISTRATION ORGANIZER

Decedent: Full Legal Name: ____
Last Address: ____
Date of Death: _________________, Married/Widowed/Divorced: (circle)
Age: ________ Birth Date: ______________ Soc. Sec. #: ______________
Estate Identification Number (if available): _________________________
Occupation (or, if retired, former occupation): _______________________
Employer: ____________________________ Tel #: __________________

Client : Full Legal Name: ____
Address: ____
Email Address: ____________________ _________________________
Soc. Sec. #: ____
Occupation (or, if retired, former occupation): _______________________
Employer: ____________________________ Tel #: __________________

FAMILY INFORMATION

Full Name of Children Street Address City, State, Zip	Birth Date	Age	# of Children	Marital Status (S/M/D)

(if no children, include names and addresses of parents and siblings)

OTHER IMPORTANT INFORMATION

Please list the names, addresses, and telephone numbers of the decedent's key advisors.

Accountant/CPA:	______________________________
Personal Bank and Banker:	______________________________
Financial Advisor:	______________________________
Insurance Advisor:	______________________________
Attorneys:	______________________________

Please circle "Yes" or "No" for the following:

Did the Decedent have a Will? If so, bring original or copy.	Yes	No
Did the Decedent have a Trust? If so, bring original or copy.	Yes	No
Did the Decedent appoint anyone to act under a Durable Power of Attorney?	Yes	No
If so, has such person been notified of their death?	Yes	No
Was the Decedent Divorced? If Yes, include a copy of the divorce decree.	Yes	No
Did the Decedent have a pre- or post-marriage contract? If Yes, include a copy of the agreement.	Yes	No
Did the Decedent ever file a federal or state gift tax returns? (please furnish copies of these returns.)	Yes	No

INVENTORY OF ASSETS
(Fair Market Value and Ownership)
Abbreviations for ownership designations on list of assets below:

Owner:	Abbreviation:
Decedent	D
Decedent and Spouse and no one else	DS
Joint tenancy with spouse	JTS
Joint tenancy with someone other than spouse	JTO
Tenancy in common with spouse	TCS
Tenancy in common with someone other than spouse	TCO
Tenants by the Entirety	TBE
If you cannot determine how the property is owned	?

Real Property:

Address:	Value:	Mortgage & Loans	Owner

Bank Accounts (Savings/Checking/Money Market/CD)

Institution	Description	Balance	Owner

Investment and Brokerage Accounts (Mutual Funds/Securities)

Institution	Description	Balance	Owner

Individual Certified Stocks or Bonds Held

Name of Company	# of Shares	Current Value	Owner

Valuable Personal Property (Automobiles, Jewelry, Antiques, Collections, etc.)

Description

Estimated Value of Household and Personal Effects:

Life Insurance

Company	Insured	Owner	Beneficiary	Death Benefit	Cash Value

Annuities

Company	Annuitant	Owner	Beneficiary	Value	Annuitized yet? (Y or N)

Pension/Profit Sharing/Stock Options/Keough

Company	Participant	Beneficiary	% Vested	Value

IRA's, 401(k)'s, 403(b)'s

Company	Participant	Beneficiary	Value

Other Assets

Asset	Value	Owner

Other Liabilities

Creditor	Current Balance	Borrower

Documents and Instruments Check List

(Please bring these documents to your initial meeting)

______ Death Certificate (certified copy)

______ Real Estate

- ______ Deeds
- ______ Mortgages
- ______ Any Recent Appraisals

______ Will(s) and Codicil(s)

______ Any Trusts to which the Decedent was a party (E.G., as trustee, beneficiary, trustmaker, grantor, or settlor)

______ Any privately held business buy-out or stock redemption agreements to which the Decedent was a party

______ Any divorce judgments and/or separation agreements

______ Any prenuptial and/or post-nuptial agreements

______ Any gift tax returns Decedent filed

______ Any (state or federal) estate tax return(s) for a spouse who died

______ Copy of the last Income Tax Return Decedent filed.

______ Any powers of attorney you have signed

______ Last Bank Statement, Investment/IRA Retirement Statements