

Estate Planning Information Checklist

The following information will be helpful in establishing your individual estate plan:

1. Names, addresses and dates of birth of all of your children (and possibly grandchildren).
2. Names, addresses and dates of birth of any person to whom you want to leave anything upon your death.
3. What are your wishes for the disposition of your assets upon an untimely death?
4. Names and addresses of any charities to which you would like to leave assets upon your death.
5. Who do you want to act as your personal representative (executor or successor trustee)? This is a person that will either distribute your assets under your trust, or make sure that your will is probated. This person should be someone you trust. This person's full name and address will be needed.
6. Who do you want to make decisions for you regarding your health care or finances if you are incapable? This person should also be someone you trust. This person's full name and address will be needed.
7. Do you have any specific requests regarding life support or invasive medical procedures if you suffer a grave injury or illness?
8. Who do you want to take care of your minor children? The full names and addresses of the guardian are needed.
9. Do you have any special assets like a vacation home that require special treatment?
10. Do you have any items of personal property that you want a particular person to have? If so, such items and persons should be identified.
11. You should make a list of all of your assets, the ownership of them (i.e. joint ownership, individual ownership or otherwise), and the value of each individual asset.
12. You should assemble deeds from all real estate that you own.
13. You should assemble all of your life insurance policies and list who owns the policy, the death benefit, the cash value and who the beneficiary is.
14. You should assemble all of your IRA information, stock brokerage account information, and any other investment account information and identify who owns the account, the amount in the account, and the beneficiary, if any, of the account.

We would be happy to meet with you and help you develop an estate plan based upon your individual needs.