

## Estate Planning Checklist

Estate Planning is an important part of planning for the future. Completing the information in this checklist will help to gather critical information you'll need in an initial consultation with an estate planning attorney.

### Basic Information About You

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Spouse's Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Email

Do you  own or  rent?

Do you own any out of state property?  Yes  No

Do you own a vehicle?  Yes  No

Do you own a business?  Yes  No

Do you have minor children?  Yes  No

Do you have any children or dependents with special needs?  Yes  No

Do you currently have a Will?  Yes  No

Do you currently have a Trust?  Yes  No

Do you have a Healthcare Power of Attorney  Yes  No

Do you have a Durable General Power of Attorney (Financial Power of Attorney)?  Yes  No

Do you have a Living Will?  Yes  No

Children / Beneficiaries / Agent(s) / Executor(s) / Trustee(s)

Gathering contact information of your children, beneficiaries, potential agent(s), executor(s), and trustee(s) can help prepare you for estate planning consultation.

\_\_\_\_\_  
Name (Child)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Child)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Agent)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Executor)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Child)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Child)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Agent)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Name (Executor)

\_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

List of Assets

Item	Approximate Value
<b>Residence</b>	_____
<b>Vehicle</b>	_____
<b>Savings Account</b>	_____
<b>Checking Account</b>	_____
<b>401(k)</b>	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
<b>Total</b>	_____

Important Notes / Additional Information

Please use this section to write down any addition information you feel may be important to include in an initial consultation or if you need additional room to list children, next-of-kin, agent(s), executor(s), or trustee(s).

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