



(E) \_\_\_\_\_

4. Grandchildren

Age

Parent

(1) \_\_\_\_\_

(2) \_\_\_\_\_

(3) \_\_\_\_\_

(4) \_\_\_\_\_

(5) \_\_\_\_\_

(6) \_\_\_\_\_

(7) \_\_\_\_\_

(8) \_\_\_\_\_

(9) \_\_\_\_\_

(10) \_\_\_\_\_

(11) \_\_\_\_\_

(12) \_\_\_\_\_

(13) \_\_\_\_\_

(14) \_\_\_\_\_

(15) \_\_\_\_\_

*The following is meant to give your attorney a good idea of the total value of your estate. Knowing your total worth is important to determine the type of estate plan that will keep your estate tax as low as possible.*

#### 5. REAL ESTATE INFORMATION

Description and location	Market Value	Debt
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

**TOTAL:** \$ \_\_\_\_\_  
**(Total value of real estate = market value less debt)**

#### 6. PERSONAL PROPERTY *Please list approximate current value:*

Automobile(s): \$ \_\_\_\_\_

Savings and Checking Accounts: \$ \_\_\_\_\_

Stocks/Bonds \$ \_\_\_\_\_

Household Furnishings \$ \_\_\_\_\_

Other Personal Assets \$ \_\_\_\_\_

7. Death Benefits from Insurance \$ \_\_\_\_\_

8. Expected inheritance \$ \_\_\_\_\_

**9. TOTAL VALUE OF ESTATE: \$ \_\_\_\_\_**  
**(Add all of the above, including total real estate value)**

10. Name of Bank(s)  
\_\_\_\_\_

11. Names of stocks, bonds and other investment:  
\_\_\_\_\_

12. Executor \_\_\_\_\_ Alternate \_\_\_\_\_

13. Funeral Arrangements \_\_\_\_\_  
\_\_\_\_\_

**14. BENEFICIARY INFORMATION:**

Names of Persons or Charitable Organizations

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8.  
\_\_\_\_\_

9. \_\_\_\_\_

10.  
\_\_\_\_\_

11.  
\_\_\_\_\_