

SAMPLE ESTATE INVENTORY FORM

This form could save you and your attorney valuable time. By filling out this form and bringing it to your first appointment, you will be providing your attorney with much of the information needed to draft an estate plan.

1. Name _____

Address _____

Phone (Work) _____ (Home) _____

Place and Date of Birth _____

Social Security Number _____ U.S. Citizen? _____

Single? Married? Widowed? Separated? Divorced?

2. Spouse _____

Place and Date of Birth _____

Social Security Number _____ U.S. Citizen? _____

3. Children Age Address

(A) _____

(B) _____

(C) _____

(D) _____

(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 investments: _____

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. _____

12. _____

13. _____

14. _____

15. _____