

Estate Inventory Form

This form is not as bad as it looks, and it 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

	Name	Age	Address
(A)	_____	_____	_____
(B)	_____	_____	_____
(C)	_____	_____	_____
(D)	_____	_____	_____
(E)	_____	_____	_____

4. Grandchildren

Name	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. _____

12. _____

Values Planning
Questions to Ask before You Plan Your Estate

1. How do you want to be remembered? By whom?
2. What kind of legacy do you want to leave for your children?
3. How much?
4. How do you want your children to use this legacy?
5. Do you have a plan to achieve your goals for your children?
6. Are your children trained in handling the wealth you intend to leave them? If not, you can begin the process by providing the opportunity for them to learn these skills by using a charitable fund or family investment partnership.
7. What values would you like to pass to your children?
8. What would your children say your values are?
9. What causes do you support?
10. Would you like the activities you support to continue after your death?
11. Are there other causes you would like to support?

To Whoever Takes Responsibility for Final Arrangements

In calm recognition of the inevitable, I have given thought to my personal wishes concerning my final arrangements. I feel that the effort I have made to pull information together and state my wishes will minimize the emotional strain on my survivors. I do not wish them to be burdened by the great pressures of having to make immediate decisions on unfamiliar matters that inescapably must be made then if I do not make them now.

Difficult though it may be for me to set this down, I feel that my loved ones would find it more difficult to make the decisions with no indication of my specific wishes.

Though these wishes may not be legally binding, I trust that they will help my survivors avoid confusion, extra expense, or the least self-reproach that might arise because of doubts, omissions, or commissions.

Signature

Date