

**DETAILED ESTATE PLANNING WORKSHEET**

I. GENERAL INFORMATION

	Spouse 1	Spouse 2
Name	_____	_____
Occupation	_____	_____
Date and place of birth	_____	_____
Home address	_____	_____
	_____	_____
Home telephone	_____	_____
Business telephone	_____	_____
Social Security Number	_____	_____
Date of Marriage	_____	_____
Place of Marriage	_____	_____
Length of IL residence	_____	_____
Prior residences during marriage	_____	_____
	_____	_____
	_____	_____
Prior marriage/s	_____	_____
	_____	_____
Any ante/post nuptial agreement?	_____	_____
	_____	_____

II. CHILDREN

Name_____	Name_____	Name_____
Birthdate_____	Birthdate_____	Birthdate_____
Birthplace_____	Birthplace_____	Birthplace_____
SS#_____	SS#_____	SS#_____
Address_____	Address_____	Address_____
_____	_____	_____
Occupation_____	Occupation_____	Occupation_____
Spouse_____	Spouse_____	Spouse_____
Children w/dates of birth	Children w/dates of birth	Children w/dates of birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
Special Needs_____	Special Needs_____	Special Needs_____
_____	_____	_____
Marital status_____	Marital status_____	Marital status_____

III. PARENTS, BROTHERS AND SISTERS

1. Parents

	Spouse 1	Spouse 2
Father	_____	_____
Mother	_____	_____
Address	_____	_____
Age, Health of Mother, or Place and Date of Death	_____	_____
Age, Health of Father, or Place and Date of Death	_____	_____
Estimated size of estate of Mother	_____	_____
Estimated size of estate of Father	_____	_____

2. Brothers/Sisters

Name	_____	_____
Address	_____	_____
Age/Date of Death	_____	_____
Name	_____	_____
Address	_____	_____
Age/Date of Death	_____	_____

3. Are there any persons other than minor children dependent on either spouse and to what extent?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

IV. GIFTS AND INHERITANCES

1. Describe the date and amount of any gifts that have been made in excess of \$10,000.00. \_\_\_\_\_

\_\_\_\_\_

2. Describe any inheritances that have been received and how the inheritance was disposed of.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Describe any gifts or inheritances that you expect to receive from any person. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

V. ASSET INFORMATION

1. Property

a. List type of tenancy, location, value and outstanding mortgage on marital residence \_\_\_\_\_  
\_\_\_\_\_

b. List type of tenancy, location, value and outstanding mortgage on recreational property \_\_\_\_\_  
\_\_\_\_\_

c. List type of tenancy, location, value and outstanding mortgage on investment property \_\_\_\_\_  
\_\_\_\_\_

2. Publicly traded stocks and bonds

Detail the type, basis, current value and describe how stock is held for each.

a. Common stocks \_\_\_\_\_  
\_\_\_\_\_

b. Preferred stocks \_\_\_\_\_  
\_\_\_\_\_

c. Bonds and debentures \_\_\_\_\_  
\_\_\_\_\_

d. Tax-exempt bonds \_\_\_\_\_  
\_\_\_\_\_

3. Closely held stocks. Give details about interests you may have in a closely-held corporation.  
\_\_\_\_\_

4. Accounts in Financial Institutions

a. Primary Checking

Bank name \_\_\_\_\_

Approximate balance \_\_\_\_\_

How held \_\_\_\_\_

b. Second Checking

Bank name \_\_\_\_\_

Approximate balance \_\_\_\_\_

How held \_\_\_\_\_

c. Savings

Bank name \_\_\_\_\_

Approximate balance \_\_\_\_\_

How held \_\_\_\_\_

d. CD's

Bank name \_\_\_\_\_  
Approximate balance \_\_\_\_\_  
How held \_\_\_\_\_

5. Life Insurance

	Husband	Wife
Company	_____	_____
Face Value	_____	_____
Cash value	_____	_____
Loans on policy	_____	_____
Owner of policy	_____	_____
Type of insurance	_____	_____
Beneficiaries	_____	_____

6. Tangible personal property

- a. Jewelry \_\_\_\_\_
- b. Antiques \_\_\_\_\_
- c. Art objects \_\_\_\_\_
- d. Automobiles \_\_\_\_\_
- \_\_\_\_\_
- e. Boats \_\_\_\_\_
- f. Stamps, coins or other collections \_\_\_\_\_
- \_\_\_\_\_

7. Describe any employee benefit plans in which you have an interest. Indicate if the plans are qualified plans under the federal income tax law, the approximate value of interests in the plan, and how payment will be made in the event of death or retirement.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Describe any outstanding debts. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Describe any potential or pending lawsuits in which you are involved. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

VI. Advisors

Other lawyers and nature of representation

\_\_\_\_\_

\_\_\_\_\_

Stockbroker \_\_\_\_\_

Investment Counselor \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Accountant \_\_\_\_\_

Real estate advisor \_\_\_\_\_

Other \_\_\_\_\_

VII. Previous Documents

Has either party signed any previous powers of attorney, will, or trust? \_\_\_\_\_

If so, please bring copies of these documents to your meeting