

ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS

DATE COMPLETED: _____

	Date of Birth	U.S. Citizen?	Married?
Husband's name			
Wife's name			

Mailing Address: _____

email address _____

Date and place of marriage _____

Children	Child's Date of Birth	Married?

Grandchildren	Parent	Grand- child's Date of Birth	Married?

ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS

Estate Planning Attorney:

Name

Telephone

Address

Accountant

Name

Telephone

Address

Investment advisor

Name

Telephone

Address

Life Insurance advisor

Name

Telephone

Address

ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS

Please indicate documents presently in force and provide a copy of each.

	Where kept?
Will	
Revocable Living Trust	
Power of Attorney	
Community Property Declaration	
Health Care Directive	
Life Insurance Trust	
Buy-Sell Agreement for Business	
Qualified Personal Residence Trust	
Grantor Retained Annuity Trust or Unitrust	
Charitable Trust	
Donor Advised Fund	
Private Foundation	
Premarital/postnuptial agreement	
Divorce decree (describe any ongoing obligations)	
Other (please list)	
Gift tax returns	

Please provide a copy of your most recent income tax returns (federal and state)

**ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS
PROPERTY AND INTERESTS IN PROPERTY OR TRUST
Please provide copies of recent account statements**

	VALUE		
	Separate Property of Husband	Separate Property of Wife	Community Property
Cash			
Amounts receivable (payable to you)			
Marketable Securities			
Investments not traded on public exchange			
Tax Deferred Annuities			
Retirement Accounts (Please provide copies of beneficiary forms):			
IRAs			
Roth IRAs			
401(k) account			
Profit Sharing Account			
Other (describe)			
Residence			
Mortgage (monthly payment _____; interest rate _____)			
2nd Mortgage (monthly payment _____; interest rate _____)			
Line of Credit			
Vacation Residence			
Mortgage (monthly payment _____; interest rate _____)			
Residential rental or commercial real estate			
Business Interests			
Vehicles:			
Recreational Vehicles (such as boat, airplane, etc.)			

**ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS
CLOSELY-HELD BUSINESS**

Entity Name _____

Type of Legal Entity _____
(corporation, S corporation, LLC, LP, etc.) _____

Owners	Percentage	Value

Board of Directors (or Managing Members)

Key Employees	Job Title

Indicate how each of the above is related to you, if applicable.

**ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS
LIFE INSURANCE**

For each policy, please provide a copy of:

- Policy
- Beneficiary form
- Most recent annual statement.

	1	2	3	4	5
Issuing Company					
Policy Number					
Policy Owner*					
Insured					
Amount of Death Benefit					
Annual Premium					
Cash Surrender Value					

* If policy owner is a trust, please provide a copy of the trust instrument.

**ESTATE PLANNING ORGANIZER, MARRIED INDIVIDUALS
ANNUITY CONTRACTS**

For each annuity contract please provide a copy of:

- Annuity contract
- Beneficiary form
- Most recent annual statement.

	1	2	3	4	5
Issuing Company					
Policy Number					
Owner					
Annuitant					
Amount of Death Benefit, if Any					
Premium					
Cash Surrender Value					