

Personal Information

Date _____

Legal Name _____

First

Middle

Last

Permanent Address _____

Phone Number _____

Date of Birth _____ Social Security No. _____

Marital Status Single Married Widowed Divorced

Legal Name of Spouse (if married) _____

First

Middle

Last

Permanent Address (if different from above) _____

Date of Birth _____ Social Security No. _____

If divorced or widowed, please list name and address of former spouse:

Title to Property

Is title of any property owned by, or with Former Spouse now in your name only? (Give necessary details on back of this page.)

Will

Do you have a Will? Yes No if so, please attach a copy.

Children/Relations

List names of children, pre-deceased children, any children by other marriages, children of pre-deceased children. (If no children, please list parents and/or brothers and sisters.)

Name	Relationship	Date of Birth	Address
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

BONDS, STOCKS, MORTGAGES, NOTES OR TRUST DEEDS:

In Husband's name only (H)

In Wife's name only (W)

Jointly (J)

	Cost When Acquired	Current Value	Title Held
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Intangibles _____

REAL ESTATE OWNED:

Address	Value	Title
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Real Estate _____

NOTES OR MORTGAGES OWING AGAINST YOUR ESTATE:

	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____

Total Indebtedness \$ _____

INSURANCE POLICIES

Your estate would receive your life insurance should your named beneficiary predecease you and no contingent beneficiary has been named.

Company	Kind of Policy	Beneficiary	Amount
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

Total Insurance \$ _____

RETIREMENT BENEFITS

Please explain monthly income and death benefits.

Total \$ _____

The approximate net value of (my) (our) estate is: _____