

# GRAY PLANT MOOTY

## *Estate Planning Guide*

Date \_\_\_\_\_

Husband

Wife

Full Name

\_\_\_\_\_

\_\_\_\_\_

Birth Date

\_\_\_\_\_

\_\_\_\_\_

Social Security #

\_\_\_\_\_

\_\_\_\_\_

Home Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Home Telephone

\_\_\_\_\_

\_\_\_\_\_

Business Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business Telephone

\_\_\_\_\_

\_\_\_\_\_

E-Mail Address

\_\_\_\_\_

\_\_\_\_\_

Children's Names

Birth Date

City of  
Residence

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## FINANCIAL INVENTORY

*Ownership and Approximate Value*

<u>ASSETS</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Home	_____	_____	_____
Other Real Estate	_____	_____	_____
Automobiles, Personal Property	_____	_____	_____
Bank Accounts	_____	_____	_____
Stocks & Bonds	_____	_____	_____
Closely Held Business Interests	_____	_____	_____
Life Insurance (face value)			
On husband's life*	_____	_____	_____
On wife's life*	_____	_____	_____
Individual Retirement Accounts*	_____	_____	
Pension, Profit Sharing and Other Retirement Plans*	_____	_____	
Other Assets ( <i>describe</i> )			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<b>TOTAL ASSETS</b>	_____	_____	_____

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*\*For these assets, please list your primary and contingent  
beneficiaries on the next page*

# FINANCIAL INVENTORY

<u>LIABILITIES</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Home Mortgage	_____	_____	_____
Other Debts ( <i>describe</i> )			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL LIABILITIES	_____	_____	_____

Beneficiary Designations:

Life Insurance    Primary: \_\_\_\_\_  
Contingent: \_\_\_\_\_  
\_\_\_\_\_

Retirement Plans    Primary: \_\_\_\_\_  
Contingent: \_\_\_\_\_  
\_\_\_\_\_

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**ADDITIONAL INFORMATION**

	<u>Husband</u>	<u>Wife</u>
Do you now have a will?	_____	_____
Do you own property jointly with anyone other than your spouse?	_____	_____
Are you now a beneficiary or trustee of any trust?	_____	_____
Do you own real estate located in a state other than Minnesota?	_____	_____
Have you ever been divorced?	_____	_____
Have you and your spouse signed a prenuptial agreement?	_____	_____
Are any of your children deceased?	_____	_____
Are you a U.S. citizen?	_____	_____

List any businesses of which you are a major stockholder, director, officer, or partner:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Also, consider the following questions prior to meeting with your attorney:

- Who do you want to administer your estate?
- Who do you want to administer any trusts?
- Who do you want to act as guardian of your minor children?
- Do you want to establish trusts for your children?
- Do you want to make gifts to charities?

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