

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

STRICTLY CONFIDENTIAL
FOR ATTORNEY'S USE ONLY



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*	_____	_____	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
TOTAL ASSETS	_____	_____	_____

**STRICTLY CONFIDENTIAL
FOR ATTORNEY'S USE ONLY**

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

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?

**STRICTLY CONFIDENTIAL
FOR ATTORNEY'S USE ONLY**