

GRAY PLANT MOOTY

Estate Planning Guide

Date _____

Full Name _____

Birth Date _____

Social Security # _____

Home Address _____

Home Telephone _____

Business Address _____

Business Telephone _____

E-Mail Address _____

| <u>Children's Names</u> | <u>Birth Date</u> | <u>City of Residence</u> |
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FINANCIAL INVENTORY

Approximate Value

ASSETS

Home _____

Other Real Estate _____

Automobiles, Personal Property _____

Bank Accounts _____

Stocks & Bonds _____

Closely Held Business Interests _____

Life Insurance (face value)* _____

Individual Retirement Accounts* _____

Pension, Profit Sharing and Other Retirement
Plans* _____

Other Assets (*describe*) _____

TOTAL ASSETS _____

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

FINANCIAL INVENTORY

LIABILITIES

Home Mortgage

Other Debts (*describe*)

TOTAL
LIABILITIES

Beneficiary Designations:

Life Insurance

Primary:

Contingent:

Retirement Plans

Primary:

Contingent:

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ADDITIONAL INFORMATION

Yes / No

Do you now have a will? _____

Do you own property jointly with anyone? _____

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? _____

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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