

**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

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Accountant

Name

Telephone

Address

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Investment advisor

Name

Telephone

Address

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Life Insurance advisor

Name

Telephone

Address

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**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.) \_\_\_\_\_

<b>Owners</b>	<b>Percentage</b>	<b>Value</b>

**Board of Directors (or Managing Members)**


<b>Key Employees</b>	<b>Job Title</b>

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
<b>Issuing Company</b>					
<b>Policy Number</b>					
<b>Policy Owner*</b>					
<b>Insured</b>					
<b>Amount of Death Benefit</b>					
<b>Annual Premium</b>					
<b>Cash Surrender Value</b>					

\* 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
<b>Issuing Company</b>					
<b>Policy Number</b>					
<b>Owner</b>					
<b>Annuitant</b>					
<b>Amount of Death Benefit, if Any</b>					
<b>Premium</b>					
<b>Cash Surrender Value</b>					