ESTATE PLANNING WORKSHEET

Weitz Law Firm, PLLC

PERSONAL INFORMATION

Client's Legal Name: ____

Prefer to be called ______________________

Birth date________________ SS#___________________ US Citizen? __________

Home Address_______________________________ City____________ State _____ Zip ________

Home telephone ________________ County of Residence __________ Business Telephone ________

Employer __________________________________ Position ________________________

Business Address _____________________________ City ___________ State _____ Zip_________

Email Address ___________________________

Marital Status ____________________

Spouse's Legal Name: ____

Prefer to be called: _______________ ______

Birth date: ________________ SS#____________________ US Citizen?__________

Employer __________________________ Position ______________________________

Business Address _____________________ ________ City ___________State_____ Zip_____

REAL PROPERTY

TYPE: Any interest including your family residence, vacation home, time share, vacant land, etc.

General Description and/ or Address	Owner	Market Value	Loan Balance

FURNITURE AND PERSONAL EFFECTS

TYPE: List separately only major personal effects such as, jewelry, collections, antiques, furs, and all other valuable non-business personal property (indicate type below and ***give a lump sum for miscellaneous, less valuable items***)

Type or Description	Owner	Market Value

AUTOMOBILES, BOATS, AND RVS

TYPE: For each vehicle, boat, RV, etc. please list the following: description, how titled, market value and encumbrance:

Vehicle Description	Owner	Market Value	Loan Balance

BANK & SAVINGS ACCOUNTS

TYPE: Checking Account "CA, Savings Account "SA", Certificates of Deposits "CD", Money Market "MM" (indicate type below). Do not include IRA's or 401(k)'s here

Vehicle Description	Owner	Market Value	Loan Balance

STOCKS, BONDS, AND NON-RETIREMENT INVESTMENT ACCOUNTS

TYPE: List any and all stocks and bonds you own. If held in a brokerage account, lump them together under each account.

Stock, Bonds, or Investment Accounts	Type	Owner	Amount
____	___________	____________	____________
____	___________	____________	____________

Note: If an account is in your name (or your spouse's name) with a transfer-on-death designation for another person, please specify and provide a copy of the beneficiary designation.

QUALIFIED RETIREMENT PLANS

TYPE: List any and all qualified retirement plans you own. ADDITIONAL INFORMATION: Describe the company sponsor or investment company, the owner, the current value of the plan, the type of the plan, any designated beneficiaries, and any other pertinent information.

Company: ___________________________ **Owner:** _______________________ **Market Value:** ___________________

Type of Retirement Plan (IRA, 401k, Pension, VIP, other):__________________________________

Primary Beneficiary(ies):____

Contingent Beneficiary(ies):____

Company: ___________________________ **Owner:** _______________________ **Market Value:** ___________________

Type of Retirement Plan (IRA, 401k, Pension, VIP, other):__________________________________

Primary Beneficiary(ies):____

Contingent Beneficiary(ies):____

Company: ___________________________ **Owner:** _______________________ **Market Value:** ___________________

Type of Retirement Plan (IRA, 401k, Pension, VIP, other):__________________________________

Primary Beneficiary(ies):____

Contingent Beneficiary(ies):____

LIFE INSURANCE POLICIES AND ANNUITIES

TYPE: List any and all life insurance policies you own or that insure your life. ADDITIONAL INFORMATION: Insurance company, death benefit, whose life is insured, who owns the policy, type of policy, and the current beneficiaries.

Insurance Company: ____________________________ **Death Benefit:** ________________ **Insured:**________________

Policy Owner: ___________________ **Type of Policy: (Term, Whole, Annuity)**_________________________

Primary Beneficiary(ies):______________________________________

Contingent Beneficiary(ies):____________________________________

Insurance Company: ____________________________ **Death Benefit:** ________________ **Insured:**________________

Policy Owner: ___________________ **Type of Policy: (Term, Whole, Annuity)**_________________________

Primary Beneficiary(ies):______________________________________

Contingent Beneficiary(ies):____________________________________

Insurance Company: ____________________________ **Death Benefit:** ________________ **Insured:**________________

Policy Owner: ___________________ **Type of Policy: (Term, Whole, Annuity)**_________________________

Primary Beneficiary(ies):______________________________________

Contingent Beneficiary(ies):____________________________________

BUSINESS INTERESTS

TYPE: General and Limited Partnerships, Sole Proprietorships, privately owned corporations, professional corporations, oil interests, farm and ranch interests. **ADDITIONAL INFORMATION:** Give a description of the interests, who has the interest, your ownership in the interest and the estimated value of the interests.

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ANTICIPATED INHERITANCE, GIFT, OR LAWSUIT JUDGMENT

TYPE: Gifts or inheritance that you expect to receive at some time in the future, or moneys that you anticipate receiving through a judgment in a lawsuit. Describe in appropriate detail.

Description:

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OTHER ASSETS

TYPE: Other property is any property that does not fit into any listed category.

Property	Owner	Value
____	________	__________
____	________	__________

SUMMARY OF VALUES

ASSETS	Client	Spouse	Total Value
Real Property	__________	__________	______________
Furniture and Personal Effects	__________	__________	______________
Automobiles	__________	__________	______________
Bank and Savings Account	__________	__________	______________
Stocks and Bonds	__________	__________	______________
Life Insurance and Annuities	__________	__________	______________
Retirement Plans	__________	__________	______________
Business Interests	__________	__________	______________
Money owed to you	__________	__________	______________
Anticipated Inheritance	__________	__________	______________
Other Assets	__________	__________	______________
Total Assets	___________	___________	_______________

***Joint Property values enter ½ in husband's column and ½ in wife's column**