

4. Grandchildren

Age

Parent

(1) _____

(2) _____

(3) _____

(4) _____

(5) _____

(6) _____

(7) _____

(8) _____

(9) _____

(10) _____

(11) _____

(12) _____

(13) _____

(14) _____

(15) _____

The following is meant to give your attorney a good idea of the total value of your estate. Knowing your total worth is important to determine the type of estate plan that will keep your estate tax as low as possible.

5. REAL ESTATE INFORMATION

Description and location	Market Value	Debt
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
TOTAL:		\$ _____
(Total value of real estate = market value less debt)		

6. PERSONAL PROPERTY *Please list approximate current value:*

- Automobile(s): \$ _____
- Savings and Checking Accounts: \$ _____
- Stocks/Bonds \$ _____
- Household Furnishings \$ _____
- Other Personal Assets \$ _____

7. Death Benefits from Insurance \$ _____

8. Expected inheritance \$ _____

9. **TOTAL VALUE OF ESTATE:** \$ _____
(Add all of the above, including total real estate value)

10. Name of Bank(s) _____

11. Names of stocks, bonds and other investment: _____

12. Executor _____ Alternate _____

13. Funeral Arrangements _____

14. BENEFICIARY INFORMATION:

Names of Persons or Charitable Organizations

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

Values Planning: Questions to Ask before You Plan Your Estate

1. How do you want to be remembered?
2. By whom?
3. What kind of legacy do you want to leave for your children?
4. How much?
5. How do you want your children to use this legacy?
6. Do you have a plan to achieve your goals for your children?
7. Are your children trained in handling the wealth you intend to leave them? If not, you can begin the process by providing the opportunity for them to learn these skills by using a charitable fund or family investment partnership.
8. What values would you like to pass to your children?
9. What would your children say your values are?
10. What causes do you support?
11. Would you like the activities you support to continue after your death?
12. Are there other causes you would like to support?
13. How do you feel about treating the community as one of your children?