



Estate Planning/List of Assets and other Vital Information

Please answer the following questions as completely as possible. This form will be used to locate your assets and assist in administering your estate. This form will also be helpful in the event you have become incapacitated. It is recommended that you keep this form in a safe place and that you notify the nominated Executor and your Power of Attorney appointee as to its location. We recommend that you review this form once a year and update if necessary. The form can be obtained on our website <http://watsonbennett.com>.

Name: _____ Date: _____

A. Personal Information

1. Your Social Security Number: _____
2. Your date of birth: _____
3. Your address:

4. Your telephone number: _____
5. Are you a United States citizen? (circle one) YES NO
 - a. If not, what country are you a citizen? _____
6. a. Name of spouse: _____
b. Spouse's contact information: _____
c. Spouse's date of birth: _____
d. Spouse's Social Security Number: _____

e. Is your spouse a United State citizen? (circle one) YES NO

a. If not, what country is s/he a citizen? _____

B. Family Information

1. a. Oldest child's name: _____

b. Oldest child's date of birth: _____

c. Oldest child's social security number: _____

d. Oldest child's address: _____

e. Oldest child's personal information (specify if the child is adopted, a step-child, a child from a previous marriage, deceased, etc.): _____

f. Oldest child's spouse: _____

g. Oldest child's children and dates of birth: _____

2. a. Second child's name: _____

b. Second child's date of birth: _____

c. Second child's social security number: _____

d. Second child's address: _____



e. Second child's personal information (specify if the child is adopted, a step-child, a child from a previous marriage, deceased, etc.): _____

f. Second child's spouse: _____

g. Second child's children and dates of birth: _____

3. a. Third child's name: _____

b. Third child's date of birth: _____

c. Third child's social security number: _____

d. Third child's address: _____

e. Third child's personal information (specify if the child is adopted, a step-child, a child from a previous marriage, deceased, etc.): _____

f. Third child's spouse: _____

g. Third child's children and dates of birth: _____

4. Names and addresses of each of your siblings: _____

5. Please provide the name, address and date of birth of your next closest living relative if you do not have children, grandchildren, siblings or parents (please include address and phone number): _____

C. Miscellaneous Personal Information

1. Name, office address and office phone number of your family doctor:

2. Name, office address and office phone number of your accountant: _____

3. Name, office address and office phone number of your financial planner/broker:



4. Do you have a burial account? (circle one) YES NO

a. If yes, what is the name and address of the funeral home that the burial account is through? _____

5. Do you have a safety deposit box? (circle one) YES NO

a. If yes, what bank is the safety deposit box located?

b. What is the address of the bank where the safety deposit box is located?

c. Where are the keys to the safety deposit box located? _____

6. List the location of your Last Will and Testament:

7. List the name and address of your Power of Attorney appointee and the location of your Power of Attorney form: _____

8. Identify if you have a Living Will and where it is kept: _____

9. Do you have a long term care policy? (circle one) YES NO

a. If yes, please list the carrier of the long term care policy and the account number of the policy: _____

10. Do you have disability insurance?

- a. If yes, please list the carrier of the disability insurance policy and the account number of the policy: _____



D. Real Estate Information

1. a. List the address of your principal residence: _____

- b. List how title to your principal residence is held (i.e. sole ownership, joint tenancy with spouse, life estate, tenancy in common, etc.): _____

- c. List the purchase price and year that your principal residence was purchased:

- d. List where the abstract of title (search) is kept for your principal residence:

2. a. List the address for any other real estate you own: _____

- b. List the purpose for each piece of real estate you own other than your principal residence (i.e. rental property, vacation home, etc.): _____



c. List the manner in which each piece of real estate is held (i.e. joint tenancy with spouse, life estate, tenancy in common, etc.): _____

d. List where the abstract of title (search) is kept for each property that you own:

E. Financial Information

1. List your savings account information (bank, account number, branch location, approximate balance and how the account is titled (joint, solely in your name, etc.)): _____

2. List your checking account information (bank, account number, branch location, approximate balance and how the account is titled (joint, solely in your name, etc.)): _____



3. List information regarding any certificates of deposit or money market accounts you have (bank, account number, branch location, approximate balance and how the account is titled (joint, solely in your name, etc.)):

4. List any accounts receivable (money owed to you): _____

5. List any stocks, bonds or mutual funds that you own: _____

6. List any brokerage accounts owned by you (name and address of broker, account number, approximate balance and how the account is titled (joint, solely in your name, etc.)):

7. List any retirement accounts (IRA's, 401k's, Roth IRA's, etc.), their current value



and their beneficiaries (list issuer, account number and current value):

8. List any retirement benefits that you have received from a previous employer (please include type of benefit, employer who benefit is through, account number, approximate value): _____

9. List any insurance policies, the name of the carrier, face amount, cash value beneficiaries, policy numbers and location of the policy: _____

10. List any Annuities, the name of the issuer, names of the beneficiaries and the approximate balance: _____

11. Do you have an ownership interest in any closely held businesses? YES NO
a. If yes, please provide the name of the business entity, the nature of the



business, the type of entity, whether you are involved with the operations of the business, the approximate value of your ownership share and any income you receive from the business: _____

11. Are you currently receiving any other income? (circle one) YES NO

a. If yes, please list the source of the income and the approximate amount of income: _____

F. Personal Property

1. Identify any valuable personal property that you own and the approximate value (i.e.

jewelry, artwork, antiques, etc.): _____

G. Liabilities

1. Identify any mortgages where you are the maker and identify the real estate encumbered and the approximate balance: _____



2. List any credit cards in your name and the balance owed: _____

3. List any other debt: _____

H. Employment Information

1. Are you currently employed? (circle one) YES NO

2. If yes, please list your current employer and approximate monthly income:

3. If you are currently not employed, please list your previous employer, pension
benefits and current monthly social security income: _____

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