



Estate Planning Legacy Organizer

A Guide to Defining Values and Organizing Resources to Empower Future Generations



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relative information historical
female father
kinship person genealogical
pedigree interview mother genealogy pedigree chart genealogist
senior teenager line elderly stage family lineage human genealogy grandparent genetic genealogy
brother mom parent history family connection dynasty origins
lineage sister kin family tree analysis uncle records wife adult aunt daughter
nature cousin aging growth nephew environment dad oral interview chart age network life branch husband old
grandfather girl man human male people together
young relationship generation ancestors genetic analysis historical records
togetherness grandmother child
genetic niece couple tree
descendant woman

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Disposal Confront Trusts
Retain Contingent Value
Avoid Incapacity Plans Death Expenses Property Ownership Maximize Settle Multiple Inclusion Deferring
Life Estate Will Insurance
Income Transfer Obligation Certified Accountant Beneficiaries Documents Mediation Anticipating
Administration Goals Plan
Conflict Attorney Disputes Litigation Vehicle Family Rights Decreasing Probate

A Relational vs. Money Approach

Typically, much of the estate planning world focuses on money. But the most successful estate plans are founded on relationships. Building and preserving family wealth isn't an end in itself. Rather, it's a tool for promoting shared family values or encouraging family members to lead responsible, productive, healthy lives. Drafting a family mission statement can be an effective way to define and communicate these values.

Communicating Clearly

Because each family is different, there's no cookie-cutter formula for drafting a family mission statement. The most important thing is for the statement to clearly articulate your family's shared values, whatever they may be.

Ideally, the mission statement will also create mechanisms for intrafamily communication and for putting the statement's ideas into action. For example, the statement might call for regular family meetings. Or it may create a governance structure for managing the family's wealth and making decisions about charitable giving and other endeavors.

Few families agree on everything. But facilitating communication and decision making in this way minimizes conflicts that can arise when family members don't know what's going on or feel they have no say. To make family meetings more efficient and effective, consider inviting outside advisors to lead or participate in the meetings.

A Principle Based Approach

Many people today are moving away from a rules-based approach to estate planning and embracing a principles-based approach. Rather than conditioning a child's inheritance on a rigid list of "acceptable" behaviors, for example, a principles-based approach allows greater flexibility for trustees and others to make decisions based on the values you wish to promote.

Estate Planning Basics

If you don't have a large estate or if you plan on leaving everything to your spouse or children, you may think estate planning is not necessary. Consider, however, that that estate planning simply refers to planning that concerns your bundle of assets and regardless of the size of your bundle, proper planning can help you avoid probate or save time and even reduce potential estate taxes.

So, to dispel another common misnomer, estate planning is about much more than tax avoidance. It is the process of exercising wise discretion over your assets

throughout your life and beyond. Without it, the material resources life has afforded you the opportunity to accumulate (usually over many years) may not end up where you thought they would after you are gone.

When you die, someone will have to distribute your assets, care for surviving minor or disabled children, and make funeral and burial arrangements. If you become disabled, you may need someone to make sure your bills are paid, file your tax returns, and handle other legal and financial affairs.

If you do not have a plan in place, someone else will speak for you. It may be a friend, relative or other trusted acquaintance. However, the final say will be the government. Can you be sure they will adequately and appropriately carry out your wishes? Will their decisions honor your name, legacy and values in the way you would want?

By thinking through all of these issues today, you can begin to prepare for the long-term distribution of your property to family, friends and charitable interests, but more importantly, you can begin to prepare to pass down time honored values and traditions to empower future generations.

Clarifying What is Important to You

Before you create a last will or an estate plan, you need to determine what you want your estate plan to do. It is not a "one size fits all" process.

Distributing Your Property

No matter how wealthy or poor you consider yourself to be, everything you own will be distributed to others when you die. With proper planning, you can be sure things are to the people you choose. The initial step in the planning process is to take inventory of what you have, and then decide where you want it to go.

The Value of a Last Will

It's one thing to know how you want your property distributed and it is another thing to have the tools in place to make it happen. The most basic instrument in your estate plan is a valid last will ideally prepared by a seasoned attorney in your state of residence.

More than two-thirds of the American population die without a will.

The decision whether to make a will is an important step in ensuring those you love will get the maximum value from your estate. While there are no laws that require

you to make a will, there are laws to dictate what happens to your estate if you don't.

Fortunately, you don't have to rely on your state's laws to make decisions for you. When you prepare a will, you can decide who will receive your property. Steps may also be taken to reduce expenses and speed up the process of distributing your property and these are reasons to opt with a seasoned attorney for preparing it.

Issues with Probate Court

Probate is the legal process of carrying out the instructions of a will. Depending on how much you own, you may want to reduce estate taxes and probate issues. Probate proceedings become a matter of public record and also add to the costs of settling your estate. Taxes are typically not an issue unless you expect the value of your personal estate to exceed the federal tax exemption amount. However, if you desire to maintain confidentiality and keep certain aspects of your will out of the public record, a trust and other planning devices may be useful. Proper titling of assets is also an important step in transferring your estate.

The Value of a Trust

Maybe. Depending on the amount and type of assets you have, and the way you want to transfer or shelter your assets, a trust may be a sound part of your planning process.

The basic idea of a trust involves the transfer of ownership of an asset to a trustee who will manage it. The trustee is then responsible for managing the asset in accordance with the instructions in the trust document.

Trusts can be funded with cash, stocks and bonds, real estate or other assets and offer a variety of benefits. A trust can provide income for life, valuable tax savings and the security of professional financial management with the ability to provide for a cause that is special to you. You may also avoid probate for assets in a trust. There are several different types of trusts and a qualified financial or legal advisor can help you determine which may work best for you.

Using a Revocable Living Trust

If your estate is complicated, you should consider a Revocable Living Trust as an addition to a will. With a living trust, you can transfer property to the trust while you are alive, but maintain control of your assets by naming yourself the trustee. When you die, your co-trustee or chosen successor would then manage the

property and disburse your assets according to the specifications you lay out in the trust agreement.

Because it is revocable, you may change or terminate the trust at any time with certain conditions.

With a living trust, you keep clear of the costs, hassles and publicity of probate. One drawback is you must retitle any assets you want to put into a living trust, such as a house, in the name of the trust.

You should also consider the expense of setting up a Revocable Living Trust. The setup costs may not significantly offset any savings in probate fees and expenses.

Using a Credit Shelter Trust for Large Estates

This is an especially useful device for couples with very large estates under current tax laws. Under current tax law, individuals can transfer unlimited amounts to a surviving spouse without any estate tax considerations. However, this may not totally avoid estate taxes on large amounts — it will simply delay the taxes until the surviving spouse's death.

By transferring all of your assets to your spouse, you don't take advantage of your personal unified tax credit or estate tax exemption. When your spouse dies, you can use his or her credit to avoid taxes on a portion of the remaining estate. However, you've lost the combined value of using the individual exemptions.

With a Credit Shelter Trust (also called a Bypass Trust, AB Trust or Family Trust), you pass, in your will, an amount equal to the estate tax exemption to the trust, and pass the rest of your estate to your spouse. You can also specify how you want the trust to be used. For example, you can stipulate that income from the trust goes to your spouse and when he or she dies, the principal will be distributed among your children.

Since the remaining spouse can leave an additional amount, up to the current estate tax exemption amount, tax-free to your heirs, you and your spouse can effectively double the amount of your estate that is shielded from taxes by using this strategy.

Using a Charitable Trust

There are several trusts which may be useful for taking care of your needs while also allowing you to help others through a donation to a good cause. Two of the most common types are a **Charitable Remainder Unitrust** and a **Charitable Remainder Annuity Trust**.

A Charitable Remainder Unitrust offers real value if you are concerned about the effects of inflation on your retirement income. With this type of trust, you retain variable income for your lifetime or a fixed term of years, claim a current income tax deduction and make a future gift to a charity of your choosing when the remainder of your trust reverts to the charity at the time of your death.

With a Charitable Remainder Annuity Trust, you irrevocably transfer money or stock to a charity. At the time you create the trust, you and the charity agree to a fixed rate of return. The charity then invests the assets and pays you an income for life. At the time of your death, the remainder of the trust reverts to the charity.

What is the difference between a unitrust and an annuity trust? The unitrust pays income based on a fixed percentage, but on a variable amount. So if the unitrust investments perform well, income maybe increased. This also allows for long-term income growth. In addition, only a unitrust can be used when a gift of property is the asset used to fund the trust.

An annuity trust pays income based on a fixed percentage of a fixed amount. This means the donor will always know exactly what the income will be—the amount will never change. Because of this, donors who count on the security of a fixed income may like this kind of trust better.

If you have highly-appreciated assets such as common stock or property, utilization of a charitable trust can help you delay capital-gains taxes on the appreciation and put additional dollars to work. A portion of the income payments may be non-taxable to you or, at least, receive favorable tax treatment. You may also qualify for a current-year charitable deduction.

Appointing Fiduciaries

Any estate planning options require the appointment of an executor, administrator or trustee. This should be a person you trust who has a balance of personal skills, organizational ability and some financial knowledge.

This person will need to locate your will, handle the will through probate, collect and inventory your assets, pay debts against the estate, pay bills and taxes of the estate, prepare income tax returns for your final year and transfer property to beneficiaries.

Financially Support Loved Ones

When creating your estate plan, you may discover you would like to provide more for your loved ones—especially if your home is not yet paid for or if you would

like to provide funding for your children's or grandchildren's education.

Various insurance options allow you to provide additional financial support to your loved ones should your existing property not sufficiently cover your long-term goals. Life insurance is just one tool for adding to the value of your estate.

Through proper ownership of the life insurance policies, or through the use of a Life Insurance Trust our plan can be structured to keep the proceeds out of your taxable base and remain non-taxable for your beneficiaries.

Caring for Minor and Disabled Beneficiaries

If you have any children who are minors and/or disabled, someone will need to take care of them when you die. By planning ahead, you can be sure they are taken care of by someone you trust.

Think about the type of life you want your children to have and identify any people you know who can provide that for them. Be sure to consult with the person(s) you choose to name as guardian(s). Also, be sure to name an alternate in case the primary guardian dies before you do or chooses not to serve.

You can also set aside assets in a trust that will provide the resources necessary to meet their ongoing needs.

Additional Questions Related to Care of Minors:

Who can provide the best physical and emotional care for my children?

Who will be the best role model for my children?

Who has the financial means to support my children?

Who has values and morals that most closely match my own?

Who is in sufficient health to provide adequate care?

Who will most likely provide a stable, long-term home for my children?

Incapacity

Although we don't like to think about it, at some point we may not be able to make decisions for ourselves. If that happens, someone will have to make financial and health decisions for us. There are numerous organizations and resources available to guide you in the process of choosing someone to make health care decisions for you in the event you become incapacitated.

The Value of a Durable Power of Attorney

By signing a power of attorney, you can authorize another person to act on your behalf to perform any

number of specified acts such as banking, real estate transactions, business operations and insurance and lawsuit management. There are two types of durable powers of attorney:

An “immediate power of attorney,” which is not affected by your subsequent disability or incapacity, and,

A “springing power of attorney,” which does not go into effect until you become disabled or incapacitated. It is this type that is most commonly incorporated into an estate plan.

Many states have now eliminated springing powers of attorney due to issues with abuse and enforcement.

The Importance of Healthcare Powers of Attorney

Health care powers of attorney (also known as health care proxies) recognize your right to appoint a health care agent you trust to decide about medical treatment in the event you become unable to decide personally. Unless you specify otherwise, the agent will have the same authority you would to decide about treatment. The authority encompasses the right to forego treatment or to consent for needed treatment. The agent’s authority begins only when a physician determines you have lost the capacity to decide about treatment.

Planning for Long Term Medical Care Costs

Today, people are living longer. Given a choice, most would prefer to enjoy their freedom and independence in the comfort and security of their own homes. There are times, however, when circumstances require extended care either through home visitation by skilled medical personnel or a move to a long-term care facility.

When planning for the future, it may be advisable to include a discussion about the possibility of long-term care becoming a reality for you or your spouse. It does not need to create worry. Instead, use your discussion to help guide you in decisions about insurance, cash flow and Medicare issues.

Planning clearly for funeral and burial

By clearly identifying your funeral and burial wishes, you can ease the strain and burden on your loved ones at what will already be a stressful time in their lives. Although these instructions can be included in your will, it is better to write them out, if desired, in a separate document.

Unless your will is easy to locate and all parties are aware of your instructions in the will, there may not be time to assure your wishes are fulfilled. It is also a good idea to discuss these matters with family ahead of time to provide a verbal, as well as a written, expression of your desires.

Gifting Now to Downsize Estate

Do you really need to accumulate every-thing until you die? Are you taking advantage of the annual exclusion for gift giving to others? Have you explored ways to utilize your resources for ministry and mission purposes now?

The Value of an Experienced Attorney

No, just like you don’t “have” to call a plumber to fix a leaky faucet or contact an electrician to install a light fixture. However, ask if you are really better off doing it yourself.

The most common reason for not wanting to use an attorney is to avoid paying legal fees. Typically, depending on your location and the attorney you choose, to have a will drafted along with a durable power of attorney and health care directive, you can expect to pay between \$1000–2000.

Trusts can run two to three times that much or more. If you have a very simple estate without any complex ownership or transfer issues, you may be able to create some of your own documents as long as you make sure they meet the legal requirements of your state of residence. There are materials on the market and information on the internet that can help you in your process.

However, consider how an investment of a few hundred dollars may save you much more than that should you overlook something. If you have minor and/or disabled children, if you own property in multiple states, if you own a business, if you’ve been married more than once or if you have unique circumstances of any kind, a competent professional could prove to be a bargain in the long run.

Wise counsel, at a reasonable fee, may also spare your family and other loved ones a lot of heartache when they are faced with the reality of the disposition of your estate.

The key is to understand what we can do ourselves and when it is necessary to call on an outside party with the expertise we need. If you utilize an attorney, you can still

save some money in the process. Just be sure to have your records and intentions well-organized. Know what you have and what you want to do with it. Get as much helpful information as you can in advance. That way, your attorney doesn't have to "keep the meter running" just for the purposes of helping you get your information in order.

Starting Your Estate Planning

The sooner you get started, the sooner you are prepared to take care of your needs and the needs of your loved ones.

Reviewing Your Estate Planning

Any time you have a significant life event, you should take a look at your documents. This includes any time you move, change jobs, sell or buy a home, or experience a birth, death or marriage in your family. If your financial situation changes substantially or if you are considering changes to your administrators, successor trustees or beneficiaries, pull out your documents and review them. Even if you don't have any major changes, you should go over your plans every three to four years just to make sure they say what you currently intend to say.

If you have a Revocable Living Trust, be sure to title your assets correctly in the name of the trust to avoid problems later. This process is often referred to as "trust funding".

Keep in mind that irrevocable documents generally cannot be changed after you execute them.

First Planning Steps

The evaluation sections immediately following this one will help you begin to organize your physical assets. These sections are intentionally situated to start the process because we've found that getting clear about the tangible assets can be a bridge leading to discussing deeper considerations such as personal priorities and values which will follow in latter sections.

Welcome to your estate planning mission. Your journey to begin building your legacy estate plan begins here.

Best,

The I&E Pro Team

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Summary of legal tools available to help you meet your estate planning goals.

Although wills are the most common estate planning tools, there are many others — each with a specific function — that help ensure your intentions are carried out the way you want. Some are more complex than others and each requires a different level of expertise. Also, because each tool serves a specific purpose, the ones that are right for you depend entirely on your specific estate planning needs.

- ✧ **Last Wills** are used primarily to distribute property, although they also are used to appoint guardians for minor and/or disabled children. For a will, you assign an executor (the person who handles the administration) to lead your will through probate (the legal process for validating and implementing your will).
- ✧ **Codicils** are amendments to existing wills. Sometimes it is easier — and less expensive — to write a minor change as a separate document than to rewrite your entire will.
- ✧ **Trusts** are financial tools that help reduce estate taxes and control the assets distributed to your heirs, especially if you have children who are minors. For any trust, you must appoint a person to manage it. This person is called the trustee.
- ✧ **Various insurance** options allow you to provide additional financial support to your loved ones should your existing property not sufficiently cover your long-term goals.
- ✧ **Inter Vivos** gifts are gifts that you give while you are still alive. By reducing the size of your estate before you die, it will be easier to distribute assets later.
- ✧ When you assign someone with **power of attorney**, you give them the right to make financial decisions on your behalf. These can be given at any time, but are typically designed to go into effect if you become incapacitated.
- ✧ **Healthcare Powers of Attorney** are like regular powers of attorney, except they give the person the right to make health care decisions for you, not financial decisions.
- ✧ **Living Wills** are documents that clearly state your wishes for medical care in case of incapacitation. These generally include instructions as to what treatments to administer or withhold.
- ✧ **Funeral Directives** typically state your wishes so your family does not need to make those decisions for you during their period of mourning.

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PERSONAL INFORMATION

My information

Name: _____ Social Security Number: _____
(Full legal name including maiden, if applicable)

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____ Birthdate: _____ Birthplace: _____

☐ Single

☐ Married (complete spouse information)

☐ Widowed (complete former spouse information)

☐ Divorced (complete former spouse information)

Spouse information

Name: _____ Social Security Number: _____
(Full legal name including maiden, if applicable)

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____ Birthdate: _____ Birthplace: _____ Marriage date: _____

Location: _____

My former spouse information

Name: _____ Birthdate: _____
(Full legal name including maiden, if applicable)

Marriage date: _____ Location: _____

Reason: ☐ Death ☐ Divorce Date: _____ Location: _____

Name: _____ Birthdate: _____
(Full legal name including maiden, if applicable)

Marriage date: _____ Location: _____

Reason: ☐ Death ☐ Divorce Date: _____ Location: _____

Spouse's former spouse information

Name: _____ Birthdate: _____
(Full legal name including maiden, if applicable)

Marriage date: _____ Location: _____

Reason: ☐ Death ☐ Divorce Date: _____ Location: _____

Name: _____ Birthdate: _____
(Full legal name including maiden, if applicable)

Marriage date: _____ Location: _____

Reason: ☐ Death ☐ Divorce Date: _____ Location: _____

MILITARY AND EMPLOYMENT BENEFITS

My military service and employers

Branch: _____ Rank/Paygrade: _____

Years of service: _____ Discharged date: _____ Status: _____

Benefits in effect ☐ Retired pay ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

Employer 1: _____ Employed from: _____ to _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Benefits in effect ☐ Retirement plan* ☐ Profit sharing* ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

Employer 2: _____ Employed from: _____ to _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Benefits in effect ☐ Retirement plan* ☐ Profit sharing* ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

Spouse's military service and employers

Branch: _____ Rank/Paygrade: _____

Years of service: _____ Discharged date: _____ Status: _____

Benefits in effect ☐ Retired pay ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

Employer 1: _____ Employed from: _____ to _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Benefits in effect ☐ Retirement plan* ☐ Profit sharing* ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

Employer 2: _____ Employed from: _____ to _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Benefits in effect ☐ Retirement plan* ☐ Profit sharing* ☐ Life insurance* ☐ Medical benefits
☐ Disability insurance ☐ Other: _____

**Complete information on these items in the Asset INVENTORY section.*

FAMILY HISTORY

My parents' information

Father's name: _____ Birthdate: _____
(Full legal name)

Birthplace: _____ Date of death: _____

Mother's name: _____ Birthdate: _____
(Full legal name)

Birthplace: _____ Date of death: _____

Brothers and sisters

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Spouse's parents' information

Father's name: _____ Birthdate: _____
(Full legal name)

Birthplace: _____ Date of death: _____

Mother's name: _____ Birthdate: _____
(Full legal name)

Brothers and sisters

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

FAMILY HISTORY (continued)

Children

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

FAMILY HISTORY (continued)

Children (continued)

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Spouse name: _____ Marriage date: _____

Children of this marriage:

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

MY MEDICAL HISTORY

Physicians

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

ILLNESSES/SURGERIES/HOSPITALIZATIONS

Date	Condition	Doctor/hospital
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ILLNESSES/SURGERIES/HOSPITALIZATIONS (continued)[illegible]

SPOUSE MEDICAL HISTORY

Physicians

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

ILLNESSES/SURGERIES/HOSPITALIZATIONS

Date	Condition	Doctor/hospital
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ILLNESSES/SURGERIES/HOSPITALIZATIONS (continued)[illegible]

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ASSET INVENTORY

Bank accounts

Financial institution: _____ Account Number: _____

Type: ☐ Checking ☐ Savings ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ Checking ☐ Savings ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ Checking ☐ Savings ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ Checking ☐ Savings ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Bank accounts total: \$ _____

(Transfer amount to page 31.)

Certificates of deposit

Financial institution: _____ Account Number: _____

Type: ☐ 6 month ☐ 12 month ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ 6 month ☐ 12 month ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ 6 month ☐ 12 month ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ 6 month ☐ 12 month ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Certificates of deposit total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Securities (stocks, bonds, mutual funds, etc.)

Financial institution: _____ Account Number: _____

Type: _____ Value: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: _____ Value: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: _____ Value: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: _____ Value: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Securities total: \$ _____

(Transfer amount to page 31.)

Individual retirement plans

Financial institution: _____ Account Number: _____

Type: ☐ IRA ☐ Keogh ☐ Roth ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ IRA ☐ Keogh ☐ Roth ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ IRA ☐ Keogh ☐ Roth ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Financial institution: _____ Account Number: _____

Type: ☐ IRA ☐ Keogh ☐ Roth ☐ Other: _____ Balance: \$ _____

Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: _____

Individual retirement plans total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Employer-sponsored retirement plans

My Employer 1 retirement plan Account Number: _____

Type: ☐ 401(k) ☐ 403(b) ☐ Other: _____ Value: \$ _____

Alternate payee benefits ☐ Yes ☐ No Beneficiary: ☐ Spouse ☐ Other: _____

My Employer 2 retirement plan Account Number: _____

Type: ☐ 401(k) ☐ 403(b) ☐ Other: _____ Value: \$ _____

Alternate payee benefits ☐ Yes ☐ No Beneficiary: ☐ Spouse ☐ Other: _____

Spouse's Employer 1 retirement plan Account Number: _____

Type: ☐ 401(k) ☐ 403(b) ☐ Other: _____ Value: \$ _____

Alternate payee benefits ☐ Yes ☐ No Beneficiary: ☐ Spouse ☐ Other: _____

Spouse's Employer 2 retirement plan Account Number: _____

Type: ☐ 401(k) ☐ 403(b) ☐ Other: _____ Value: \$ _____

Alternate payee benefits ☐ Yes ☐ No Beneficiary: ☐ Spouse ☐ Other: _____

Employer-sponsored retirement plans total: \$ _____

(Transfer amount to page 31.)

Profit sharing

My Employer 1 profit sharing Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____

My Employer 2 profit sharing Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____

Spouse's Employer 1 profit sharing Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____

Spouse's Employer 2 profit sharing Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____

Profit sharing total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Life insurance

My military group life insurance Policy Number: _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

My employer life insurance Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

My employer 2 life insurance Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Spouse's military group life insurance Policy Number: _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Spouse's employer 1 life insurance Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Spouse's employer 2 life insurance Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Company: _____ Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term ☐ Other _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____ Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Company: _____ Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term ☐ Other _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____ Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Company: _____ Policy Number: _____

Type: ☐ Term ☐ Whole life ☐ Universal ☐ Variable ☐ Group Term ☐ Other _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____ Cash Value: \$ _____

Beneficiary: ☐ Spouse ☐ Other: _____ Face Value: \$ _____

Insurance cash value total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Real estate holdings

Address or survey name and abstract number: _____

City: _____ State: _____ County: _____

Purchase date: _____ Cost: \$ _____ Approximate value: \$ _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____

Lien against property? ☐ Yes (Complete information on page 30.) ☐ No

Address or survey name and abstract number: _____

City: _____ State: _____ County: _____

Purchase date: _____ Cost: \$ _____ Approximate value: \$ _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____

Lien against property? ☐ Yes (Complete information on page 30.) ☐ No

Address or survey name and abstract number: _____

City: _____ State: _____ County: _____

Purchase date: _____ Cost: \$ _____ Approximate value: \$ _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____

Lien against property? ☐ Yes (Complete information on page 30.) ☐ No

Real estate holdings total: \$ _____

(Transfer amount to page 31.)

Automobiles

Make and model: _____ VIN Number: _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____ Value: \$ _____

Lien on automobile? Yes ☐ (Complete information on page 30.) ☐ No

Make and model: _____ VIN Number: _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____ Value: \$ _____

Lien on automobile? Yes ☐ (Complete information on page 30.) ☐ No

Make and model: _____ VIN Number: _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____ Value: \$ _____

Lien on automobile? Yes ☐ (Complete information on page 30.) ☐ No

Make and model: _____ VIN Number: _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____ Value: \$ _____

Lien on automobile? Yes ☐ (Complete information on page 30.) ☐ No

Automobiles total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Miscellaneous assets (jewelry, furniture, artwork, etc.)

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Description: _____

Location: _____ Value: \$ _____

Miscellaneous assets total: \$ _____

(Transfer amount to page 31.)

ASSET INVENTORY (continued)

Business interests

Company: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____

Form of ownership: ☐ Sole proprietorship ☐ Partnership ☐ Corporation

☐ Other: _____

Net value: \$ _____ Ownership interest: _____ % Your value in business: \$ _____

Company: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____

Form of ownership: ☐ Sole proprietorship ☐ Partnership ☐ Corporation

☐ Other: _____

Net value: \$ _____ Ownership interest: _____ % Your value in business: \$ _____

Company: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____

Form of ownership: ☐ Sole proprietorship ☐ Partnership ☒ Corporation

☐ Other: _____

Net value: \$ _____ Ownership interest: _____ % Your value in business: \$ _____

Company: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name held in: ☐ Mine ☐ Spouse ☐ Other: _____

Form of ownership: ☐ Sole proprietorship ☐ Partnership ☐ Corporation

☐ Other: _____

Net value: \$ _____ Ownership interest: _____ % Your value in business: \$ _____

Business interests total: _____

(Transfer amount to page 31.)

LIABILITIES

Provide company or person's name and amount due for any outstanding mortgages, loans or debts.

[illegible]

Liabilities total:

(Transfer amount to page 31.)

ESTATE SUMMARY

Bank accounts total	_____
Certificates of deposit total	_____
Securities total	_____
Individual retirement plans total	_____
Employer-sponsored retirement plans total	_____
Profit-sharing total	_____
Life insurance totals	_____
Real estate holdings total	_____
Automobiles total.....	_____
Miscellaneous assets total	_____
Business interests total	_____
Total assets:	_____
Less liabilities:	_____
NET ESTATE VALUE:	_____

PROFESSIONAL DIRECTORY

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

Name: _____ Business type*: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Telephone: _____

**Indicate attorney, CPA, insurance agent, etc.*

DOCUMENT INVENTORY

Safe Deposit Box (SDB) number: _____ Key location: _____

Name(s) held in ☐ Mine ☐ Spouse ☐ Other: _____

Bank location: _____

Home Fireproof Safe (FPS) location: _____

Combination or key location: _____

Important File location: _____

Box location: _____

Document	Stored				
	SDB	FPS	File	Box	Other location
Adoption papers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Annuity contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Appliance warranties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Appraisals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Automobile titles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Birth certificates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Cemetery plot deeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Credit card statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Death certificates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Deeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Divorce papers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Durable Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Employee benefit statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Health Care Proxy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Income tax returns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Insurance policies:					
(Life)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
(Health)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
(Home)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
(Other)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Leases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Living Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Marriage certificates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Military records:					
(Mine)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
(Spouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Mortgage documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Mutual Fund Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other securities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

DOCUMENT INVENTORY (continued)

	SDB	FPS	File Box	Other location	
Pre/Post nuptial agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Pre-planned funeral information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Property improvement invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Retirement information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Retirement plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Revocable Living Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Social Security information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Stock certificates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Titles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Trust agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Will:					
(Mine)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
(Spouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other important documents:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Valuables inventory					
Coins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Jewelry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Stamps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other collections:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

NOTE: Before storing important documents in a safe deposit box, VERIFY your executor will HAVE access to it at the time of your death. In some states, safe deposit boxes are sealed for a time upon the renter's death.

WILL PLANNING CHECKLIST

Before meeting with your attorney to create a will, collect all of the details (including relevant paperwork) on the following items:

- ☐ Legal name, permanent address and birth date for all parties involved
- ☐ Date and place of marriages and divorces
- ☐ Pre- or post-marital agreements
- ☐ Current wills or codicils
- ☐ Living trust agreements (revocable or irrevocable)
- ☐ Names and addresses of children and other heirs
- ☐ Employment information
- ☐ Names and addresses of persons to be your executor, guardian or trustee
- ☐ Income tax returns for the last three years
- ☐ Gift tax returns
- ☐ Life insurance policies
- ☐ Information on retirement plans, profit sharing and deferred compensation plans
- ☐ Business agreements related to corporation, partnership and sole proprietorship interests
- ☐ Listing of all real estate including type of ownership, present fair market value and mortgages
- ☐ Listing of personal property including ownership, location and value
- ☐ Outline of objective and disposition of your estate
- ☐ Legal names and addresses for individuals and charitable organizations benefiting from your estate

MY ESTATE DISTRIBUTION

Personal representative

Executor or executrix: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Alternate executor or executrix: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Estate distribution

Do you wish to leave your estate to your spouse? ☐ Yes ☐ No (indicate other desire) (if leaving less than 100% specify reasons)

Specific bequests

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

MY ESTATE DISTRIBUTION (continued)

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

NOTE: If you designate a charitable organization as a beneficiary, it is generally a good idea to notify the organization in order to assist with their long-term planning.

SPOUSE ESTATE DISTRIBUTION

Personal representative

Executor or executrix: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Alternate executor or executrix: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Estate distribution

Do you wish to leave your estate to your spouse? ☐ Yes ☐ No (indicate other desire) (if less than 100% specify reasons)

Specific bequests

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specific item(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

SPOUSE ESTATE DISTRIBUTION (continued)

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

Beneficiary name: _____

Address: _____

Bequest: ☐ Amount: \$ _____

☐ Specificitem(s): _____

Birthdate: _____ Relationship: _____

City: _____ State: _____ ZIP Code: _____

☐ Percentage: _____% ☐ Remainder of estate

NOTE: If you designate a charitable organization as a beneficiary, it is generally a good idea to notify the organization in order to assist with their long-term planning.

This page intentionally left blank

MY FINAL ARRANGEMENTS

See Document Inventory for pre-planned funeral information: ☐ Yes ☐ No

Organ Donor ☐ Yes ☐ No

Funeral home or church: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Type of service: ☐ Christian ☐ Fraternal ☐ Military ☐ Memorial service with no casket present

Please cremate: ☐ No ashes ☐ Instruction for ashes as follows:

Funeral instructions: ☐ Closed casket ☐ Open casket

Grave site information and location: _____

Preferred ministers: _____

Preferred soloist(s): _____

Favorite hymns/songs:

1. _____

2. _____

3. _____

Favorite scripture passages/verses/poems/quotes:

1. _____

2. _____

3. _____

Favorite flowers:

1. _____

2. _____

3. _____

In lieu of flowers, please send donations to the following charity(ies):

1. _____

2. _____

3. _____

MY FINAL ARRANGEMENTS (continued)

Preferred deliverer(s) of testimonials or eulogies:

1. _____
2. _____
3. _____

Pallbearers:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Honorary pallbearers:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Please contact the following people to let them know of pending arrangements:

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

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Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

MY FINAL ARRANGEMENTS (continued)

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

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Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Copy page as necessary.

Vital statistics and information for obituary: _____

Memorial type and inscription: _____

SPOUSE FINAL ARRANGEMENTS

See Document Inventory for pre-planned funeral information: ☐ Yes ☐ No

Organ Donor ☐ Yes ☐ No

Funeral home or church: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Type of service: ☐ Christian ☐ Fraternal ☐ Military ☐ Memorial service with no casket present

Please cremate: ☐ No ashes ☐ Instruction for ashes as follows:

Funeral instructions: ☐ Closed casket ☐ Open casket

Grave site information and location: _____

Preferred ministers: _____

Preferred soloist(s): _____

Favorite hymns/songs:

1. _____

2. _____

3. _____

Favorite scripture passages/verses/poems/quotes:

1. _____

2. _____

3. _____

Favorite flowers:

1. _____

2. _____

3. _____

In lieu of flowers, please send donations to the following charity(ies):

1. _____

2. _____

3. _____

SPOUSE FINAL ARRANGEMENTS (continued)

Preferred deliverer(s) of testimonials or eulogies:

1. _____
2. _____
3. _____

Pallbearers:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Honorary pallbearers:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Please contact the following people to let them know of pending arrangements:

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

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Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

SPOUSE FINAL ARRANGEMENTS (continued)

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

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Address: _____ City: _____ State: _____ ZIP Code: _____

Name: _____ Telephone: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Copy page as necessary.

Vital statistics and information for obituary: _____

Memorial type and inscription: _____

Ex. A

MY LIFE JOURNAL

This series of questions is for recording the events of your life through your own words, as only you can express them.

My childhood

Parents and grandparents: Where did they come from? _____

Family history? _____

Are there any stories about your family or events that made an impression on you? _____

What are your earliest memories of your childhood? _____

Describe the house where you spent your childhood. _____

What kind of childhood games or activities did you play or participate in as a child? _____

Did you have a favorite toy? _____

What were your chores or responsibilities as a child? _____

What are your fondest memories of your childhood? _____

Tell about your brothers and/or sisters as children. _____

As a young child, what was your life like (be specific)? _____

Tell about relatives or neighbors you remember as a child. _____

Ex. A

MY LIFE JOURNAL (continued)

What was school like (classes, teachers, friends, etc)? _____

Were you a good student? _____

What did you like best about school? _____

What was your favorite subject? _____

What was your favorite sport? _____

Did you win any awards for athletic events? _____

Did you ever move, if so, from where to where? _____

What kinds of transportation did you use? _____

What did you want to be when you grew up? _____

Did you take any trips as a child? If so where? _____

Is there anything else from your childhood you would like to talk about? _____

My formative or teen years

Who were your close friends? _____

Where did you learn your value system? _____

Describe your value system. _____

Where did you learn your work ethic? _____

Describe your work ethic. _____

What do you feel you missed during these formative years that would have benefited you as an adult? _____

Tell about school during these years. _____

Ex. A

MY LIFE JOURNAL (continued)

Who was your favorite teacher in school and why? _____

What was your favorite sport? _____

Did you win any awards for athletic events? _____

Who was your hero and why? _____

What is the most memorable experience you had as a youth? _____

Do you have any regrets from those years? _____

What were your areas of interest as a teenager? _____

What were some mischievous things you did as a teenager? _____

Did you ever get into real trouble as a teenager? _____

What were your ambitions as a teenager? _____

Who was the most influential person in your life as a teenager? _____

Did you make any decisions during this period that may have altered the course of your life? _____

What kind of jobs did you have during these years? _____

What did you learn from these jobs that has helped you in life? _____

What other responsibilities did you have as a youth? _____

Ex. A

MY LIFE JOURNAL (continued)

What do you remember about world events during these years? _____

How did these world events affect you and your family? _____

Did you do any traveling as a youth? _____

What stands out in your mind as the single most important event in your life during this time period? _____

Is there anything else you want to tell about your youth that has not been covered? _____

My early adulthood (age 20 to 30)

If you attended an institution of higher learning, tell about your experiences. _____

Tell about any military service you had. _____

When did you marry, to whom and where, etc. _____

Tell about your vocation. _____

Tell about your family life. _____

What "life lessons" were you learning? _____

Did you move from where you grew up? _____

What were your ambitions at this time in your life? _____

What were your dreams? _____

Ex. A

MY LIFE JOURNAL (continued)

What made you happy during those years? _____

What significant world events had an impact on you or your family? _____

Did you experience any personal tragedy during these years? _____

What impact did that tragedy have on you? _____

What was, in your opinion, your greatest accomplishment during this time? _____

What was your greatest disappointment of this time period? _____

Did anything occur in your life that may have altered the course of your life? _____

If you could change anything from those years, what would it be? _____

When do you think you really became an adult, and what event stands out in your mind that shows that level of maturity?

My middle adulthood (age 30 to 60)

What is the most significant thing that happened to you during your 30s? _____

During your 40s? _____

During your 50s? _____

Ex. A

MY LIFE JOURNAL (continued)

If you could go back in time are there any things you would change, omit or do differently? _____

What was the most meaningful personal event that occurred in your life during those years and why? _____

Are there any others? _____

Were there any major world events that shaped or changed the direction of your life? _____

If so, how?

Do you have any regrets? _____

Has your attitude toward life changed and if so how? _____

Do you feel that you missed out on anything because of other commitments? _____

What was the most rewarding aspect of your life during those years? _____

Outside of your immediate family, who has had the most influence on your life and why? _____

What life lessons do you wish your parents had taught you that you want to be sure your children learn? _____

What "pearls of wisdom" would you want to pass on to your heirs? _____

What are you most proud of during those years? _____

Ex. A

MY LIFE JOURNAL (continued)

What brought you the most happiness during those years? _____

What saddens you from those years? _____

What do you remember with the greatest fondness? _____

What was the most amusing thing that happened to you during your life? _____

Tell about your closest personal relationship and what you received from it. _____

Did you achieve your goals? _____

Do you consider yourself a success? _____

Were you happy? _____

Did your hopes and dreams come true? _____

How did your faith grow during those years? _____

What trials occurred in your life? _____

What lessons did you learn as a result? _____

Is there anything else about you and your life during those middle adult years? _____

Ex. A

MY LIFE JOURNAL (continued)

My latter adulthood (age 60 and beyond)

What have you enjoyed most about your latter years? _____

What has brought you the most happiness during these years? _____

What has saddened you the most? _____

Looking back on your life, with your experience, knowledge and wisdom, what in your opinion is the most important lesson you've learned in your life? _____

If you could share lessons from your life with others, what would you want to teach them? _____

What has been your greatest personal accomplishment? Why? _____

When all else fails, what can you always count on? Why? _____

At this time in your life, who is the person you have most admired and why? _____

As you reflect on your life, if you could have done anything differently, what would it have been? _____

Over the course of your lifetime, what world event stands out the most in your mind? _____

What has changed the most over your lifetime (communications, transportation, knowledge, science, technology, family life, etc.)?

Please explain.

In all of your life, what has been the single most significant event or high point? _____

Ex. A

MY LIFE JOURNAL (continued)

Please answer this question: The single most important piece of advice I can give you based on my life is: _____

How do you want to be remembered? _____

Is there anything else you would want to tell about your life during your latter years? _____

Additional comments: _____

Ex. B

SPOUSE LIFE JOURNAL

This series of questions is for recording the events of your life through your own words, as only you can express them.

My childhood

Parents and grandparents: Where did they come from? _____

Family history? _____

Are there any stories about your family or events that made an impression on you? _____

What are your earliest memories of your childhood? _____

Describe the house where you spent your childhood. _____

What kind of childhood games or activities did you play or participate in as a child? _____

Did you have a favorite toy? _____

What were your chores or responsibilities as a child? _____

What are your fondest memories of your childhood? _____

Tell about your brothers and/or sisters as children. _____

As a young child, what was your life like (be specific)? _____

Tell about relatives or neighbors you remember as a child. _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

What was school like (classes, teachers, friends, etc)? _____

Were you a good student? _____

What did you like best about school? _____

What was your favorite subject? _____

What was your favorite sport? _____

Did you win any awards for athletic events? _____

Did you ever move, if so, from where to where? _____

What kinds of transportation did you use? _____

What did you want to be when you grew up? _____

Did you take any trips as a child? If so where? _____

Is there anything else from your childhood you would like to talk about? _____

My formative or teen years

Who were your close friends? _____

Where did you learn your value system? _____

Describe your value system. _____

Where did you learn your work ethic? _____

Describe your work ethic. _____

What do you feel you missed during these formative years that would have benefited you as an adult? _____

Tell about school during these years. _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

Who was your favorite teacher in school and why? _____

What was your favorite sport? _____

Did you win any awards for athletic events? _____

Who was your hero and why? _____

What is the most memorable experience you had as a youth? _____

Do you have any regrets from those years? _____

What were your areas of interest as a teenager? _____

What were some mischievous things you did as a teenager? _____

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What were your ambitions as a teenager? _____

Who was the most influential person in your life as a teenager? _____

Did you make any decisions during this period that may have altered the course of your life? _____

What kind of jobs did you have during these years? _____

What did you learn from these jobs that has helped you in life? _____

What other responsibilities did you have as a youth? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

What do you remember about world events during these years? _____

How did these world events affect you and your family? _____

Did you do any traveling as a youth? _____

What stands out in your mind as the single most important event in your life during this time period? _____

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Tell about any military service you had. _____

When did you marry, to whom and where, etc. _____

Tell about your vocation. _____

Tell about your family life. _____

What "life lessons" were you learning? _____

Did you move from where you grew up? _____

What were your ambitions at this time in your life? _____

What were your dreams? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

What made you happy during those years? _____

What significant world events had an impact on you or your family? _____

Did you experience any personal tragedy during these years? _____

What impact did that tragedy have on you? _____

What was, in your opinion, your greatest accomplishment during this time? _____

What was your greatest disappointment of this time period? _____

Did anything occur in your life that may have altered the course of your life? _____

If you could change anything from those years, what would it be? _____

When do you think you really became an adult, and what event stands out in your mind that shows that level of maturity? _____

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What is the most significant thing that happened to you during your 30s? _____

During your 40s? _____

During your 50s? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

If you could go back in time are there any things you would change, omit or do differently? _____

What was the most meaningful personal event that occurred in your life during those years and why? _____

Are there any others? _____

Were there any major world events that shaped or changed the direction of your life? _____

If so, how?

Do you have any regrets? _____

Has your attitude toward life changed and if so how? _____

Do you feel that you missed out on anything because of other commitments? _____

What was the most rewarding aspect of your life during those years? _____

Outside of your immediate family, who has had the most influence on your life and why? _____

What life lessons do you wish your parents had taught you that you want to be sure your children learn? _____

What "pearls of wisdom" would you want to pass on to your heirs? _____

What are you most proud of during those years? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

What brought you the most happiness during those years? _____

What saddens you from those years? _____

What do you remember with the greatest fondness? _____

What was the most amusing thing that happened to you during your life? _____

Tell about your closest personal relationship and what you received from it. _____

Did you achieve your goals? _____

Do you consider yourself a success? _____

Were you happy? _____

Did your hopes and dreams come true? _____

How did your faith grow during those years? _____

What trials occurred in your life? _____

What lessons did you learn as a result? _____

Is there anything else about you and your life during those middle adult years? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

My latter adulthood (age 60 and beyond)

What have you enjoyed most about your latter years? _____

What has brought you the most happiness during these years? _____

What has saddened you the most? _____

Looking back on your life, with your experience, knowledge and wisdom, what in your opinion is the most important lesson you've learned in your life? _____

If you could share lessons from your life with others, what would you want to teach them? _____

What has been your greatest personal accomplishment? Why? _____

When all else fails, what can you always count on? Why? _____

At this time in your life, who is the person you have most admired and why? _____

As you reflect on your life, if you could have done anything differently, what would it have been? _____

Over the course of your lifetime, what world event stands out the most in your mind? _____

What has changed the most over your lifetime (communications, transportation, knowledge, science, technology, family life, etc.)? Please explain.

In all of your life, what has been the single most significant event or high point? _____

Ex. B

SPOUSE LIFE JOURNAL (continued)

Please answer this question: The single most important piece of advice I can give you based on my life is: _____

How do you want to be remembered? _____

Is there anything else you would want to tell about your life during your latter years? _____

Additional comments: _____

Ex. C

REVIEW CHECKLIST

Please take time to review and update your RECORDS regularly to inform and assist your loved ones.

Review dates

Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____
Date: _____	Reviewed by: _____

Important Reminder {DISCLAIMER}

*This material is presented for **educational and informational purposes only** and is **NOT** designed to be used for a **legal document, a substitute, a replacement, a revision or a codicil to a will**. It is **NOT** intended to serve as **professional tax or legal advice**. It **COVERS** a broad **VARIETY** of topics of concern to many senior adults and others, but it is by no means an exhaustive list of all the questions you may need to consider in your particular situation. Tax and probate laws pertaining to estates and estate settle- ments **VARY from state to state**. Insurance and Estate Strategies LLC encourages consulting local expert estate legal counsel when considering estate planning options. State laws govern trusts, wills and other documents.*