

## ESTATE INVENTORY FORM

This form is not as bad as it looks, and it could save you and your attorney valuable time. By filling out this form and bringing it to your first appointment, you will be providing your attorney with much of the information needed to draft an estate plan.

1. Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone (work) \_\_\_\_\_ (home) \_\_\_\_\_

Place & Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_ U.S. Citizen \_\_\_\_\_

Single [ ] Married [ ] Widowed [ ] Separated [ ] Divorced [ ]

2. Spouse \_\_\_\_\_

Place and date of birth \_\_\_\_\_

Social Security Number \_\_\_\_\_ U.S. Citizen \_\_\_\_\_

3. Children            Age            Address

(A) \_\_\_\_\_

(B) \_\_\_\_\_

(C) \_\_\_\_\_

(D) \_\_\_\_\_

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. 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 investments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

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. \_\_\_\_\_

13. \_\_\_\_\_

14. \_\_\_\_\_