ESTATE PLANNING WORKSHEET WILLS / TRUSTS

Date:_____

Name:							
	First	Mide	dle	Last	SSN		
Spouse:							
	First	Mid	dle	Last	SSN		
Any other name	s by which ye	ou or your spouse ha	we been known				
Address(include	e County):						
				How long ha	ve you resided in MO:_		
				Mobile:			
			Wife e-mail address				
ausband e-maii	address		whe e-	man address			
Marital Status:	Single	Married	Divorced	Widow			
	Date & Pla	ce of Marriage:					
		nge & Birthdate:					
(a)		(b)					
(c)		_(d)					
Living Childre	n previous m	narriage:					
	Husband:_						
	Wife:						
Husband's Date							
		ages:					
-	•				/Title		
w ne Employer							
Address			City, State, Zij	۲			
Address							

Assets: Please provide a brief description of the assets you currently own:

Real Estate:	<u>Description</u>	<u>Value</u>	<u>Debt</u>	
Vehicles:				
venicles.				
	· 			
Bank Accts:				
Safe Deposit:				
_				
Stocks/Bonds/M	[utual Funds:			
Cert. Of Deposi	t:			
Collections, Jew				
Life Insurance:				
Trust:				
11 ust.				
Debts: List your	estimated Unsecured D	ebt \$		
Advisors (accour	ntant, insurance agent, i	nvestment advisor)		
Husband's Rela	tives (identify father, m	other, siblings)		
Wife's Relatives	s (identify father, mother	r, siblings)		
How did you hea	r of this office?			