

Estate Planning Preparation Worksheet

What to gather before your first estate planning consultation

Personal Information

- Full legal names of you and your spouse/partner
- Dates of birth, Social Security numbers
- Citizenship status
- Current address and county of residence
- Prior marriages or divorces (dates and relevant agreements)

Family Information

- Names and dates of birth for all children (including stepchildren)
- Names of grandchildren
- Any family members with special needs or disabilities
- Any family members with substance abuse, creditor, or spending concerns
- Current status of any family relationships that may affect planning

Assets

- Real estate (addresses, approximate values, how title is held)
- Bank accounts (checking, savings, CDs) with approximate balances
- Investment accounts (brokerage, mutual funds)
- Retirement accounts (401k, IRA, pension) with beneficiary designations
- Life insurance policies (face value, owner, beneficiary)
- Business interests (type of entity, ownership percentage, buy-sell agreements)
- Vehicles, valuable personal property (jewelry, collections, art)
- Digital assets (cryptocurrency, online accounts)

Liabilities

- Mortgage balances
- Auto loans or leases
- Credit card debt
- Student loans
- Any personal guarantees or co-signed obligations

Key Decisions to Consider

- Who should serve as executor of your estate?
- Who should serve as guardian for minor children?
- Who should have power of attorney (financial and healthcare)?
- How should your assets be divided among beneficiaries?
- Do you have specific wishes for healthcare or end-of-life decisions?
- Are there specific gifts (cash, property, personal items) you want to make?
- Do you want to include charitable giving in your plan?

Existing Documents to Bring

- Current will or trust
- Powers of attorney (financial and healthcare)
- Living will / advance directive
- Prenuptial or postnuptial agreements
- Deeds to real property
- Business operating agreements or bylaws
- Recent tax returns (2–3 years)