

Estate Planning Preparation Worksheet

What to gather before your first consultation

To make the most of your estate planning consultation, please gather the following information ahead of your appointment. You don't need every item — bring what you have, and your attorney will guide you through the rest.

1. Personal Information

For yourself and your spouse (if applicable):

- Full legal names and any prior names
- Dates of birth and Social Security numbers
- Current addresses and contact information
- Citizenship status
- Date and county of marriage (if applicable)
- Any prior marriages, divorces, or prenuptial agreements

2. Family Information

- Full names, dates of birth, and addresses of all children
- Names and ages of grandchildren
- Any family members with special needs or disabilities
- Any family members receiving government benefits (SSI, Medicaid)
- Any children from prior relationships
- Dependents you currently support

3. Assets — What You Own

Approximate values are fine at this stage:

- Real estate (home address, approximate value, how title is held)
- Bank accounts (checking, savings, CDs — bank name and approximate balance)
- Investment accounts (brokerage, mutual funds — firm name and approximate value)
- Retirement accounts (401k, IRA, pension — type, custodian, approximate value)
- Life insurance policies (company, face value, who is the beneficiary?)
- Business interests (entity type, ownership %, estimated value)
- Vehicles, boats, or recreational vehicles
- Valuable personal property (jewelry, collections, art)

- Money owed to you (loans, notes receivable)

4. Liabilities — What You Owe

- Mortgage balance(s)
- Home equity loan or line of credit
- Vehicle loans
- Credit card debt
- Student loans
- Personal loans or other obligations

5. Existing Documents — Bring Copies If Available

- Current Will or Trust
- Powers of Attorney (financial and healthcare)
- Living Will or Advance Directive
- Deeds to real property
- Recent tax returns (past 2 years)
- Beneficiary designation forms (life insurance, retirement accounts)
- Business operating agreements, partnership agreements
- Pre- or postnuptial agreements
- Any existing guardianship nominations

6. Key Decisions to Think About

Your attorney will walk you through these in detail, but it helps to start thinking about them:

- Who should serve as your Executor (Personal Representative)?
- Who is your alternate Executor if your first choice can't serve?
- Who should receive your assets, and in what proportions?
- Who should serve as guardian for minor children?
- Who should make financial decisions for you if you're incapacitated (Power of Attorney)?
- Who should make healthcare decisions for you (Healthcare Power of Attorney)?
- Do you have end-of-life preferences (life support, organ donation)?
- Are there specific gifts you'd like to make (charities, individuals, heirlooms)?
- Do you want to provide for pets?

This guide is for informational purposes only and does not constitute legal advice. Consult an attorney for advice specific to your situation.