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Estate Planning Preparation Worksheet

Gather these items before your first estate planning consultation

Personal Information

- ✓ Full legal names (you and spouse/partner)
- ✓ Dates of birth
- ✓ Citizenship status
- ✓ County of residence
- ✓ Prior marriages or divorces (dates and agreements)

Family Information

- ✓ Names and dates of birth for all children
- ✓ Names of grandchildren
- ✓ Family members with special needs or disabilities
- ✓ Substance abuse, creditor, or spending concerns
- ✓ Relationship issues that may affect planning

Liabilities

- ✓ Mortgage balances
- ✓ Auto loans or leases
- ✓ Credit card debt
- ✓ Student loans
- ✓ Personal guarantees or co-signed obligations

Assets

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

Key Decisions to Consider

- ✓ Who serves as executor of your estate?
- ✓ Who serves as guardian for minor children?
- ✓ Who holds your financial power of attorney?
- ✓ Who holds your healthcare power of attorney?
- ✓ How are assets divided among beneficiaries?
- ✓ Specific gifts — cash, property, personal items?
- ✓ Charitable giving in your plan?
- ✓ Healthcare or end-of-life wishes?

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)
- ✓ Life insurance and retirement account statements