

PERSONAL ESTATE WORKSHEET

Prepared on _____

This is an information form to aid you in organizing and planning your personal estate. Please answer all questions completely. Your spouse should fill out a separate worksheet.

1. PERSONAL INFORMATION. Please provide some basic personal information about you and your family:

YOUR FULL NAME: _____

STREET ADDRESS: _____

CITY/STATE/ZIP: _____ TEL: _____

DATE OF BIRTH: _____ SS NUMBER: _____

MARRIED (YES/NO): _____ FORMER MARRIAGE (YES/NO): _____

YOUR SPOUSE'S FULL NAME: _____

STREET ADDRESS: _____

CITY/STATE/ZIP: _____ TEL: _____

DATE OF BIRTH: _____ SS NUMBER: _____

MARRIED (YES/NO): _____ FORMER MARRIAGE (YES/NO): _____

If you have more than one child, please add the following information for each child on the reverse side of this page:

YOUR CHILD'S FULL NAME: _____

STREET ADDRESS: _____

CITY/STATE/ZIP: _____ TEL: _____

DATE OF BIRTH: _____ MARRIED (YES/NO): _____

STATUS (NATURAL/ADOPTED/STEP): _____