



**Jaspers, Moriarty & Wetherille, P.A.  
ESTATE PLANNING WORKSHEET**

**GENERAL INFORMATION**

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Place of Birth: \_\_\_\_\_

Date and location of any past Wills, Codicils, Health Care Directives, or Power of Attorney documents:

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**Spouse (if applicable):**

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Place of Birth: \_\_\_\_\_

Date and location of any past Wills, Codicils, Health Care Directives, or Power of Attorney documents:

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**Children by birth and/or adoption (if applicable):**

- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_
- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_
- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_
- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_
- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_
- Full Name and DOB: \_\_\_\_\_
  - Please note if the biological parents of the child are not both spouses/clients: \_\_\_\_\_

**DISTRIBUTION OF ESTATE/RESIDUE**

- How do you wish to divide your estate? Equally amongst your children, or other? Please include name, relationship and percentage (Specific bequests for personal property can be noted on the last page of the worksheet):

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- Are you specifically excluding any child (by birth or adoption) from either spouse in your estate plan? If so, whom?

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- Who do you want to nominate as your Personal Representative (the person who will administer your estate)? Please indicate if the Personal Representative is different for one spouse and the other. Commonly we see spouses nominate one another. (You can name more than one individual if you would like two individuals to act jointly as Co-Personal Representatives):

Full Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

- If your first nomination of Personal Representative is unable or unwilling to serve, name an individual who would you like to nominate as a successor Personal Representative:

Full Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

- If you have minor children, name an individual who you would like to serve as their Guardian (or Co-Guardians if you wish to nominate more than one individual)? Please indicate if the Guardian is different for each child:

Full Name(s): \_\_\_\_\_

Relationship(s): \_\_\_\_\_

- If you have minor children, name an individual who you would like to serve as the Trustee of a minor contingent Trust (or Co-trustees if you wish to nominate more than one individual):

Full Name(s): \_\_\_\_\_

Relationship(s): \_\_\_\_\_

- If a Trust is created for minor children, list what age you would like distributions to be made (ex. One-half at age 21, and the rest at age 25):

Age: \_\_\_\_\_

Percentage: \_\_\_\_\_

Age: \_\_\_\_\_

Percentage: \_\_\_\_\_

### **ASSETS**

- Real Estate

○ Address: \_\_\_\_\_

\_\_\_\_\_

County: \_\_\_\_\_

Ownership Interest (i.e. joint tenants, tenants-in-common):

Approximate Value: \_\_\_\_\_  
\_\_\_\_\_

○ Address: \_\_\_\_\_  
\_\_\_\_\_

County: \_\_\_\_\_

Ownership Interest (i.e. joint tenants, tenants-in-common):  
\_\_\_\_\_

Approximate Value: \_\_\_\_\_

- Life Insurance Policies

- Value: \_\_\_\_\_

- Institution: \_\_\_\_\_

- Ownership Interest: \_\_\_\_\_

- Beneficiary Designation: \_\_\_\_\_

- Value: \_\_\_\_\_

- Institution: \_\_\_\_\_

- Ownership Interest: \_\_\_\_\_

- Beneficiary Designation: \_\_\_\_\_

- Bank Accounts (Checking, Savings, Money Market, etc.)

- Amount: \_\_\_\_\_

- Institution/type of account: \_\_\_\_\_

- Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Pay-on-death Designation: \_\_\_\_\_

- Amount: \_\_\_\_\_

Institution/type of account: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

Pay-on-death Designation: \_\_\_\_\_

○ Amount: \_\_\_\_\_

Institution/type of account: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

Pay-on-death Designation: \_\_\_\_\_

- Stocks, Bonds, or Annuities

- Amount: \_\_\_\_\_

- Institution: \_\_\_\_\_

- Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Beneficiary Designation: \_\_\_\_\_

- Amount: \_\_\_\_\_

- Institution: \_\_\_\_\_

- Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Beneficiary Designation: \_\_\_\_\_

- Retirement Assets (401K, IRA, Roth IRA, 403B, Pension, etc.)

- Amount: \_\_\_\_\_

- Institution: \_\_\_\_\_

- Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Beneficiary Designation: \_\_\_\_\_

○ Amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

Beneficiary Designation: \_\_\_\_\_

○ Amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

Beneficiary Designation: \_\_\_\_\_

- Household goods (significant value), automobiles, recreational vehicles, boats, jewelry, etc.

○ Item: \_\_\_\_\_

Approximate Value: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

○ Item: \_\_\_\_\_

Approximate Value: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

○ Item: \_\_\_\_\_

Approximate Value: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

○ Item: \_\_\_\_\_

Approximate Value: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

- Other assets not described above (ex. Business ownership):

○ Asset Description: \_\_\_\_\_

Institution/Location: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

Beneficiary Designation, if any: \_\_\_\_\_

○ Asset Description: \_\_\_\_\_

Institution/Location: \_\_\_\_\_

Ownership Interest: \_\_\_\_\_

Beneficiary Designation, if any: \_\_\_\_\_

**DEBTS**

- Mortgage(s), HELOC, other Liens on real estate:

○ Approximate amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

○ Approximate amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Credit Card(s)

○ Approximate amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

○ Approximate amount: \_\_\_\_\_

Institution: \_\_\_\_\_

Ownership Interest (sole owner, joint owner): \_\_\_\_\_

- Student Loans

- Approximate amount: \_\_\_\_\_  
 Institution: \_\_\_\_\_  
 Ownership Interest (sole owner, joint owner): \_\_\_\_\_
- Approximate amount: \_\_\_\_\_  
 Institution: \_\_\_\_\_  
 Ownership Interest (sole owner, joint owner): \_\_\_\_\_
- Other
  - Description: \_\_\_\_\_  
 Approximate amount: \_\_\_\_\_  
 Institution: \_\_\_\_\_  
 Ownership Interest (sole owner, joint owner): \_\_\_\_\_

**OTHER SPECIFIC BEQUESTS**

If any, please use the remainder of this page to name your specific bequests of tangible personal property (not titled assets). Specifically: (1) the description of the specific personal property item you want to devise; and (2) the full legal name of who you wish to devise it to.

Ex. "Family photo albums," and "Jane Ann Doe, sister."

1. Item description: \_\_\_\_\_  
 Devisee: \_\_\_\_\_
2. Item description: \_\_\_\_\_  
 Devisee: \_\_\_\_\_
3. Item description: \_\_\_\_\_  
 Devisee: \_\_\_\_\_
4. Item description: \_\_\_\_\_  
 Devisee: \_\_\_\_\_