

## ESTATE PLANNING WORKSHEET

Name \_\_\_\_\_ Birthdate: \_\_\_\_\_ SS# \_\_\_\_\_  
 (first, middle initial, last)

Spouse \_\_\_\_\_ Birthdate: \_\_\_\_\_ SS# \_\_\_\_\_  
 (first, middle initial, last)

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

Telephone \_\_\_\_\_ /cell \_\_\_\_\_ Email \_\_\_\_\_

### Children

1<sup>st</sup> child \_\_\_\_\_ Birthdate: \_\_\_\_\_ SS# \_\_\_\_\_  
 (first, middle initial, last)

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

2<sup>nd</sup> child \_\_\_\_\_ Birthdate: \_\_\_\_\_ SS# \_\_\_\_\_  
 (first, middle initial, last)

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

3<sup>rd</sup> child \_\_\_\_\_ Birthdate: \_\_\_\_\_ SS# \_\_\_\_\_  
 (first, middle initial, last)

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

### Additional children:

Husband	Wife
<b>Personal Representative:</b> Name: City/State:	<b>Personal Representative:</b> Name: City/State:
<b>Alternate Personal Representative:</b> Name: City/State:	<b>Alternate Personal Representative:</b> Name: City/State:

<b>Guardian:</b> Name: City/State:	<b>Guardian:</b> Name: City/State:
<b>Alternate Guardian:</b> Name: City/State:	<b>Alternate Guardian:</b> Name: City/State:
<b>Trustee:</b> Name: City/State:	<b>Trustee:</b> Name: City/State:
<b>Alternate Trustee:</b> Name: City/State:	<b>Alternate Trustee:</b> Name: City/State:

