

**ESTATE PLANNING INVENTORY ANALYSIS**  
**(Husband and Wife)**

**Husband's Full Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_

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

**Phone: Home:**( ) \_\_\_\_\_ **Work:**( ) \_\_\_\_\_

**Employer:** \_\_\_\_\_

**Birth Date:** \_\_\_\_\_ **Citizenship:** \_\_\_\_\_

**Wife's Full Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_

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

**Phone: Home:**( ) \_\_\_\_\_ **Work:**( ) \_\_\_\_\_

**Employer:** \_\_\_\_\_

**Birth Date:** \_\_\_\_\_ **Citizenship:** \_\_\_\_\_

**Children/**                      **Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

**Step Children:**                      **Address:** \_\_\_\_\_

**Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

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

**Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

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

**Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

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

**Grandchildren/**                      **Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

**Step Grandchildren:** **Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

**Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

**Name:** \_\_\_\_\_                      **D/O/B:** \_\_\_\_\_

**Executor:**                      **Name:** \_\_\_\_\_

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

**Successor  
Executor:**

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

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

**Second Successor  
Executor:**

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

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

**Trustee:**

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

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

**Successor  
Trustee:**

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

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

**Second Successor  
Trustee:**

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

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

**Guardian of  
Minor Children:**

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

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

**Special Bequests:**

\_\_\_\_\_

(Individual items you may wish to bequeath to an heir)

**Balance of Estate:**

\_\_\_\_\_

(Indicate the individuals you wish to inherit your assets and the order in which they are to inherit (i.e., my spouse, and if my spouse does not survive me, then to my children, if no children survive me, then to my sister)

**Other persons for whom Husband wishes to provide:**

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

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

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

Provisions desired (indicate direct or contingent): \_\_\_\_\_

**Other persons for whom Wife wishes to provide:**

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

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

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

Provisions desired (indicate direct or contingent): \_\_\_\_\_

**Obtain COPIES of the following documents and information relating thereto:**

Prior Wills of Husband and/or Wife \_\_\_\_\_

Location of originals: \_\_\_\_\_

Prior Trusts created by Husband and/or Wife: \_\_\_\_\_

Schedule of trust assets: \_\_\_\_\_

**Life Insurance:**

**On Husband's Life:**

Policy No.	Insurance Co.	Face Amount	Owner	Beneficiary
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**On Wife's Life:**

Policy No.	Insurance Co.	Face Amount	Owner	Beneficiary
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**Remarks:** \_\_\_\_\_