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ESTATE AND ASSET PROTECTION CHECKLIST

I ask these questions not to be noseey, but so that I can tell you what will happen to your assets in the event
tragedy strikes. Remember it is not just your death that needs to be planned for. Other things may happen that
affect your assets and your ability to carry out your intentions. It is also a very useful exercise to get all of your
important papers in one place. If you already have everything in one place, then congratulations! And this
exercise should be easier for you.

- 1. Your name:
2. Email Address:
3. Street Address:
4. Cell Phone: Home Phone: Work Phone:
5. Are you married? Spouse's name
Date of Marriage:
6. Do you have children? Names & Ages
7. Are these children of both of you, or were they born prior to this marriage?
8. Do any of your children have a disability or receive government benefits of any kind? If so what kind of
benefit?

9. Do you have a current will? Attach a copy of your most recent will to this list. Where do you keep the original of this will? \_\_\_\_\_
10. If any of the children are minors, have you designated a guardian for them in the event that something happens to both parents? Who would that be? \_\_\_\_\_
11. Do you have a Durable Power of Attorney? Attach a copy.
12. Do you have a Living Will, a Designation of Health Care Surrogate? Attach copies to this list.
13. Do you own your home? \_\_\_ How is it titled? \_\_\_\_\_  
Attach a copy of the deed to this list.
14. Do you own any other real estate? Yes \_\_\_\_\_ No \_\_\_\_\_
15. Attach copies of the deeds to this list.
16. How many vehicles are in your household? \_\_\_\_\_
17. How are the vehicles titled? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
18. Attach copies of the titles to the vehicles to this list.
19. Attach a copy of your vehicle insurance declarations page \_\_\_\_\_
20. Do you have any valuable collections or art or furniture? If so, please list it and its value and how it was acquired (i.e. purchased together with spouse, purchased by myself, inherited by which spouse, etc. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
21. Do you have life insurance? Attach a copy of the declarations page and evidence of the named beneficiaries.
22. How many bank accounts do you have? \_\_\_\_\_
23. Are any of these bank accounts joint with other people? \_\_\_\_\_

24. If these accounts are joint with your spouse, were they originally opened before or after your marriage?

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25. Please attach evidence of how the accounts are held including payable on death designations.

26. Do you have any retirement accounts? Have you designated beneficiaries to your accounts? Please attach copies of the most recent statement and beneficiary designations.

27. Do you expect to inherit any money or property? If so, from whom? \_\_\_\_\_

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28. What would you like to happen to this property in the event of your death? \_\_\_\_\_

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29. Do you have any debt? You don't have to list individual debts here, just a rough idea of what's out there. \_\_\_\_\_

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