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Licensed in Wisconsin & Illinois
 Innovators in Insurance & Investments

Date of Appointment ___ / ___ / ___
Time _____
Place _____

Estate Inventory Form

Legal Name _____ (_____)
 (First) (Mi) (Last) (Nickname)

S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Spouse _____ S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Child _____ S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Child _____ S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Child _____ S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Child _____ S/NS SS# ___ - ___ - ___ Birthdate ___ / ___ / ___

Home Address _____ Phone _____

Bus. Add. _____ Phone _____

Number of Employees _____ Position _____

Spouse's Bus.Add. _____ Phone _____

Number of Employees _____ Position _____

Email _____

Email #2 _____

DL# _____ Exp _____ ST _____

Spouse DL# _____ Exp _____ ST _____

Your tax preparer is: _____

Your attorney is: _____

How would you like our firm to help you?

CHECKLIST

A. TAX RECORDS

- Past 2 years state and federal tax returns
- Recent paycheck statement showing tax and FICA withholding, automatic savings and deductions.
Number of pay periods per year _____.

B. STATE AND LEGAL

- WILL(s)
- Trust(s)
- Divorce Decree
- Other

C. COMPANY BENEFITS (DESCRIPTIVE BROCHURES AND CURRENT ACCOUNT STATEMENTS FOR:)

- Life / Health / Disability
- Pensions _____
- 401(k) Plan / Thrift Plan
- Stock Option

D. PERSONAL INSURANCE

- Life Auto
- Health Home
- Disability Other

E. SAVINGS

- # ___ of checking accounts
- # ___ of passbook accounts
- # ___ of credit union accounts
- # ___ of Money Market accounts
- # ___ of Certificates of Deposit
- # ___ of other accounts

F. INVESTMENTS

- # ___ of IRA...SEP...KEOGH
- # ___ of Mutual Funds
- # ___ of Brokerage Accounts
- # ___ of Stocks
- # ___ of Bonds
- # ___ Annuities
- # ___ Real Estate Properties
- # ___ Business Interests

ASSET / LIABILITY (Mortgage, Notes and Credit Card Information)						
Asset Description	Owed to Which Institution	Original Loan Amount & Date	Current Balance	Monthly Payment	Interest Rate	Current Market Value
1		\$	\$	\$	%	\$
2		\$	\$	\$	%	\$
3		\$	\$	\$	%	\$
4		\$	\$	\$	%	\$
5		\$	\$	\$	%	\$
6		\$	\$	\$	%	\$