

# *Individual Estate Record*



# *Immediate Notification List*

**Name 1** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

**Name 2** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

## **IMPORTANT CONTACTS**

**Funeral home** \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

**Do you have an Executor/Administrator of your estate?** ☐ Yes ☐ No

Executor/Administrator Name \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_

**Clergy** \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

**Attorney** \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

**Accountant** \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

## **OTHER PERSONS TO BE NOTIFIED** (In addition to family listed on page 8)

**Name 1** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

**Name 2** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

**Name 3** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

**Name 4** \_\_\_\_\_

Address \_\_\_\_\_

Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

# Personal History

## VITAL STATISTICS AND HISTORICAL RECORD

Full name \_\_\_\_\_ Maiden name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Social Security # \_\_\_\_\_  
Birthplace (city, state, country) \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Father's name \_\_\_\_\_  
Mother's name \_\_\_\_\_ Maiden name \_\_\_\_\_  
Occupation (or retired from) \_\_\_\_\_  
Education (highest grade completed) \_\_\_\_\_  
Religious affiliation \_\_\_\_\_

## HEALTH INFORMATION (attach additional information)

Health issues \_\_\_\_\_  
  
Physician Name 1 \_\_\_\_\_ Telephone \_\_\_\_\_  
Physician Name 2 \_\_\_\_\_ Telephone \_\_\_\_\_  
Physician Name 3 \_\_\_\_\_ Telephone \_\_\_\_\_  
Dentist Name \_\_\_\_\_ Telephone \_\_\_\_\_

## MARITAL INFORMATION

☐ Married ☐ Never Married ☐ Widowed ☐ Divorced

Spouse's name \_\_\_\_\_  
Spouse's maiden name (if applicable) \_\_\_\_\_  
Location of marriage \_\_\_\_\_ Date \_\_\_\_\_  
Marriage performed by \_\_\_\_\_  
Marriage license location \_\_\_\_\_

## FORMER MARRIAGES (this information is vital for Social Security benefits)

Formerspouse's name \_\_\_\_\_  
Divorce decree location \_\_\_\_\_  
Attorney's name \_\_\_\_\_ Telephone \_\_\_\_\_  
Address \_\_\_\_\_



# Wills and Probate

## DRAFTING A WILL

To direct the future of your estate, it can be important to have a will. A will is a document specifying a person's decisions for distributing property after death. Without a will, state law can determine who inherits your property. In addition, in the absence of a will, state law may determine who administers your estate as well as the interests of any surviving children.

The law is very detailed in its requirements with respect to such issues as the publication, signing and witnessing of wills. Seeking the advice and assistance of a trusted, competent attorney to handle this matter is important. Once you've created a will, you should review it periodically, especially if you've moved or if your family situation has changed. To ensure that changes are valid, the services of an attorney again are recommended. An attorney also can assist you with other matters such as creating a "living will," which can set forth your end of life preferences, and establishing a durable power of attorney for health care and other issues that may be of concern.

## THE PROBATE PROCESS

Following a death, probate is a process that can determine the validity of a will, provide protection for children, ensure payment to legitimate creditors and distribute remaining assets to rightful heirs. The existence of a will does not always require lengthy, formal probate proceedings. Depending on the estate's size and nature, your state or province may have procedures that simplify the process. Because formal probate proceedings and managing a substantial estate can be lengthy and detailed, the advice and services of an attorney specializing in probate are recommended.

# Location of Important Documents

Will	Birth certificate
Passport	Driver's license
Children's birth certificates	Marriage certificate
Deeds/titles	Mortgages/notes
Annuities	Military discharge
Income tax records	
Personal address book	
Email passwords and other online account information	
Other documents (e.g., living will, medical power of attorney, immigration/naturalization papers)	

# Assets and Liabilities

## ESTIMATED GROSS ASSETS

**Estimated fair market value**  
(to be updated each year in PENCIL)

Cash	\$
Aggregate value of stocks and bonds	\$
Notes receivable	\$
Life insurance	\$
Business interest	\$
Aggregate value of retirement accounts	\$
Aggregate value of real estate	\$
Trusts	\$
Miscellaneous assets (personal and household effects, etc.)	\$
<b>TOTAL GROSS ASSETS</b>	<b>\$</b>

## ESTIMATED LIABILITIES

Mortgages	\$
Bank loans	\$
Notes payable	\$
Taxes outstanding	\$
Other debts	\$

## BANK ACCOUNTS

**Name of bank 1** \_\_\_\_\_ **Type of account** \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Account number(s) \_\_\_\_\_

**Name of bank 2** \_\_\_\_\_ **Type of account** \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Account number(s) \_\_\_\_\_

**Name of bank 3** \_\_\_\_\_ **Type of account** \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Account number(s) \_\_\_\_\_

## SAFE DEPOSIT BOX

Location \_\_\_\_\_ Location of keys \_\_\_\_\_

# Assets and Liabilities *continued*

## CREDIT CARDS

Issuer _____	Account number _____
Issuer _____	Account number _____
Issuer _____	Account number _____
Issuer _____	Account number _____

## VEHICLES

Make/Model _____	Location of title _____
Make/Model _____	Location of title _____
Make/Model _____	Location of title _____

## REAL ESTATE (descriptions, locations, deed locations)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## STOCKS AND BONDS

Name of stock/bond \_\_\_\_\_ Number of shares \_\_\_\_\_ Face Value \_\_\_\_\_

Owner \_\_\_\_\_ Location of certificate \_\_\_\_\_

Broker's name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

Name of stock/bond \_\_\_\_\_ Number of shares \_\_\_\_\_ Face Value \_\_\_\_\_

Owner \_\_\_\_\_ Location of certificate \_\_\_\_\_

Broker's name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

Name of stock/bond \_\_\_\_\_ Number of shares \_\_\_\_\_ Face Value \_\_\_\_\_

Owner \_\_\_\_\_ Location of certificate \_\_\_\_\_

Broker's name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

Name of stock/bond \_\_\_\_\_ Number of shares \_\_\_\_\_ Face Value \_\_\_\_\_

Owner \_\_\_\_\_ Location of certificate \_\_\_\_\_

Broker's name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

# Assets and Liabilities *continued*

## RETIREMENT ACCOUNTS

**Type of account** (e.g., IRA, 401k) \_\_\_\_\_ **Account #** \_\_\_\_\_

Value \_\_\_\_\_ Location of account information \_\_\_\_\_

Name of financial institution where held \_\_\_\_\_

Contact person \_\_\_\_\_ Telephone \_\_\_\_\_

**Type of account** (e.g., IRA, 401k) \_\_\_\_\_ **Account #** \_\_\_\_\_

Value \_\_\_\_\_ Location of account information \_\_\_\_\_

Name of financial institution where held \_\_\_\_\_

Contact person \_\_\_\_\_ Telephone \_\_\_\_\_

## INSURANCE POLICIES

**Company** \_\_\_\_\_

Agent \_\_\_\_\_ Telephone \_\_\_\_\_

Insured \_\_\_\_\_ Location of policy \_\_\_\_\_

Policy # \_\_\_\_\_ Amount \_\_\_\_\_

Beneficiary \_\_\_\_\_

**Company** \_\_\_\_\_

Agent \_\_\_\_\_ Telephone \_\_\_\_\_

Insured \_\_\_\_\_ Location of policy \_\_\_\_\_

Policy # \_\_\_\_\_ Amount \_\_\_\_\_

Beneficiary \_\_\_\_\_

**Company** \_\_\_\_\_

Agent \_\_\_\_\_ Telephone \_\_\_\_\_

Insured \_\_\_\_\_ Location of policy \_\_\_\_\_

Policy # \_\_\_\_\_ Amount \_\_\_\_\_

Beneficiary \_\_\_\_\_

**Company** \_\_\_\_\_

Agent \_\_\_\_\_ Telephone \_\_\_\_\_

Insured \_\_\_\_\_ Location of policy \_\_\_\_\_

Policy # \_\_\_\_\_ Amount \_\_\_\_\_

Beneficiary \_\_\_\_\_

Annual review of your beneficiary(ies) can eliminate possible problems for your survivors. Each insurance company may require a certified copy of the death certificate. It would be wise to make others aware of your insurance policies to ensure claims are made in the event of multiple deaths. You may choose to duplicate this form and give a copy to someone outside your home as a reference.

# Social Security

Location of nearest Social Security Administration office \_\_\_\_\_

Social Security benefits are not paid automatically, application must be made and specific documents must be furnished. Depending on your situation, some or all of the following may be required:

- Social Security number – yours and your spouse's (or the deceased's)
- Birth certificate – yours and those of dependent children
- Marriage certificate
- Copy of death certificate

Certain qualifying restrictions also may apply, and it may take up to two months to start receiving regular payments. Full details on eligibility are available by contacting your local Social Security Administration office or visiting [www.ssa.gov](http://www.ssa.gov).

In Canada, applications for the Canada Pension Plan (CPP) should be made to the local Human Resources and Skills Development Canada (HRSDC) Income Security Program office ([www.hrsdc.gc.ca](http://www.hrsdc.gc.ca)).

# Veterans Benefits

In the U.S., veterans benefits fall into the following major categories:

- Disability Benefits
- Education and Training Benefits
- Vocational Rehabilitation and Employment
- Home Loans
- Burial Benefits
- Dependents' and Survivors' Benefits
- Life Insurance
- Health Care

Administered through the U.S. Department of Veterans Affairs (VA), each VA benefit has its own eligibility requirements. For more information about specific benefits, visit the nearest VA office or call 1-800-827-1000 from any location in the United States and Puerto Rico. VA facilities also are listed in the federal government section of telephone directories under "Veterans Affairs." In addition, information (including downloadable forms) is available online at [www.va.gov](http://www.va.gov).

In Canada, contact the Canadian Department of Veterans Affairs ([www.vac-acc.gc.ca](http://www.vac-acc.gc.ca)) for information on benefits. Other sources in Canada include the Department of National Defense and the Last Post Fund.

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