

Estate Planning Worksheet

Personal Information

- **Full Legal Name:**
- **Other Names Used:**
- **Date of Birth:**
- **Home Address:**
- **Mobile Phone:**
- **Home Phone:**
- **Email Address:**
- **Marital Status:**
- **Spouse's Name (if applicable):**
- **Children's Names and Ages (if applicable):**

Financial Information

- **Bank Accounts:**
 - Bank Name:
 - Account Type:
 - Account Number (last 4):
 - Current Balance:
- **Investment Accounts:**
 - Institution Name:
 - Account Type:
 - Account Number (last 4):
 - Current Balance:

LAW OFFICES OF
JOHN HADERLEIN, ESQ.
A CHAPTER 7/13 BANKRUPTCY DEBT RELIEF AGENCY
815-C COUNTRY CLUB DRIVE
LIBERTYVILLE, ILLINOIS 60048
MOBILE: (312) 316-4614 • FAX: (224) 433-6466

E-MAIL: JOHN@BKLAW1.COM

LICENSED IN ILLINOIS AND CALIFORNIA

- **Real Estate:**
 - Property Address:
 - Ownership Type (if known):
 - Current Market Value:
 - Mortgage Balance:
- **Life Insurance Policies:**
 - Insurance Company:
 - Policy Number (last 4):
 - Beneficiary:
 - Death Benefit Amount:

Legal Documents

- **Existing Wills and Codicils:**
 - Location of Documents:
- **Existing Trusts:**
 - Type of Trust:
 - Trustee Name:
 - Beneficiaries:
- **Existing Powers of Attorney:**
 - Type (Healthcare, Property):
 - Agent Name:
- **Existing Living Wills/Advance Directives:**
 - Location of Documents:

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- **Heirs:**
- **Proposed Executor, Successor Trustee, Power of Attorney:**
- **Proposed Legatees (Will) and Beneficiaries (Trust):**

Other Important Information

- **Retirement Accounts:**
 - Account Type (IRA, 401(k), etc.):
 - Institution Name:
 - Account Number (last 4):
 - Current Balance:
- **Business Interests:**
 - Business Name:
 - Ownership Percentage:
 - Current Value:
- **Personal Property:**
 - Description (Jewelry, Art, etc.):
 - Current Value:

Professional Advisors

- **Accountant:**
 - Name:
 - Contact Information:
- **Financial Planner:**
 - Name:
 - Contact Information: