

Estate Planning Worksheet

Asset J/I

Value

Heir

Date to Receive

■ **Real Estate**

■ **Mutual Funds/Stocks**
Bank Accounts

■ **Automobiles**

■ **Other**

■ **Dependents**

Primary Guardian

Secondary Guardian

Executor

Explain Wishes

■ **Primary** _____

■ **Secondary** _____

Assets Available for Support of Dependents

■ **Life Insurance** _____

■ **Retirement Plans** _____

■ **Other** _____
