

ADDITIONAL INFORMATION

	<u>Husband</u>	<u>Wife</u>
Do you now have a will?	_____	_____
Do you own property jointly with anyone other than your spouse?	_____	_____
Do you own real estate located in a state other than Minnesota?	_____	_____
Have you ever been divorced?	_____	_____
Have you and your spouse signed a marriage agreement?	_____	_____
Are any of your descendants deceased?	_____	_____
Are you a U.S. Citizen?	_____	_____

Also, consider the following questions prior to meeting with your attorney:

- Who do you want to administer your estate?
- Who do you want to administer your trusts?
- Who do you want to act as guardian of your minor children?
- Do you want to establish trusts for your children?
- Do you want to make gifts to charities?

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STEVEN M. GOLDETSKY ATTORNEY AT LAW *Estate Planning Guide*

	<u>Husband</u>	<u>Wife</u>
Full Name	_____	_____
Birth date	_____	_____
Home Address	_____	_____
Home Telephone	_____	_____
Business Address	_____	_____
Business Telephone	_____	_____

<u>Children's Names</u>	<u>Birth date</u>	<u>City of Residence</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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FINANCIAL INVENTORY
Ownership an Approximate Value

<u>ASSETS</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Home	_____	_____	_____
Other Real estate	_____	_____	_____
Automobiles, Personal	_____	_____	_____
Property	_____	_____	_____
Bank Accounts	_____	_____	_____
Stocks & Bonds	_____	_____	_____
Closely Held Business Interests	_____	_____	_____
Life Insurance*			
On husbands life	_____	_____	_____
On wife's life	_____	_____	_____
Individual Retirement Accounts*	_____	_____	_____
Pension, Profit Sharing and Other Retirement Plans*	_____	_____	_____
Other Assets (Describe)	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL ASSETS	_____	_____	_____

*For those assets, please list your designated beneficiary.

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Financial Inventory- (Page two)

<u>LIABILITIES</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Home Mortgage	_____	_____	_____
Other Debts (describe)			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL LIABILITIES	_____	_____	_____

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