

Your general information

Full legal name

Street Address

City / State / Zip

Date of Birth

Spouse Full legal name

Date of Birth

Contact Phone number (s)

Contact Email Address

Full name of all Children

Full name of Grandchildren

Name of individuals or organizations I want to inherit my Estate

Retirement accounts (incl. type of account) (IRA, SEP, 401K, 403B, 401a, or pension)	Estimated Value	Beneficiaries

Brokerage Accounts	Estimated Value	Transfer on Death Beneficiaries

Businesses, Privately Held Stock, etc.	Type of Business Interest	Estimated Value

Description of Other Property	Estimated Value

specific items or property details	Given to	Approx \$Value

Additional considerations?