Step 2. Take Stock of the Present

1. Family Members' Names and Relationship to You

Full Name (First, Middle Initial, Last)	Relationship	Date of Birth	Address & Phone Number	Social Security No.

Person completing this step: _____

Date completed: _____

This documentation is not intended to be a substitute for legal advice or council. It is designed to create an awareness of the need for estate planning and to help families become better acquainted with some of the devices involved.