

Step 2: Take Stock of the Present

The following pages are tables for each of the items listed below. Please fill in the information for each item. This summary of information will be needed by an attorney.

Checklists for:

1. Family members' names and relationship to you
2. Location of important papers
3. Bank accounts and insurance
 - A. Bank accounts and safety deposit box
 - B. Life insurance
4. Assets
 - A. Trusts
 - B. Real estate
 - C. Stocks and bonds
 - D. Mutual funds (not held in retirement account)
 - E. Retirement benefits, including Social Security
 - F. Personal property
5. Liabilities
 - A. Mortgages and other real estate debts
 - B. Notes, mortgages, and accounts receivable
 - C. Liens against personal property (i.e. vehicle or machinery loans)
 - D. Other personal liabilities
6. Miscellaneous
 - A. Other financial information
 - B. Gifts given

Person completing this step:

Date completed:
