

# YOST LAW FIRM

81 W 5TH STREET  
FREMONT, NEBRASKA 68025

PHONE: (402) 721-6160  
FAX: (402) 721-6198

## Estate Planning Checklist

### Personal Data

- Full Legal Name: \_\_\_\_\_
- Birthdate: \_\_\_\_\_
- Address: Include street, city state and zip code  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Email address: \_\_\_\_\_

### Family Data

- Spouse's Full Legal Name: \_\_\_\_\_
- Birthdate: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Email address: \_\_\_\_\_
- If no spouse please check one of the following: \_\_\_\_ single, \_\_\_\_ widowed, or \_\_\_\_ divorced
  
- Children:
- Full Legal Name: \_\_\_\_\_
- Age: \_\_\_\_  
If adult:
- Address include street, city, state and zip code:  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_
  
- Full Legal Name: \_\_\_\_\_
- Age: \_\_\_\_  
If adult:
- Address include street, city, state and zip code:  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_
  
- Full Legal Name: \_\_\_\_\_

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- Age: \_\_\_\_  
If adult:
- Address include street, city, state and zip code:  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_
  
- Full Legal Name: \_\_\_\_\_
- Age: \_\_\_\_  
If adult:
- Address include street, city, state and zip code:  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_
  
- Full Legal Name: \_\_\_\_\_
- Age: \_\_\_\_  
If adult:
- Address include street, city, state and zip code:  
\_\_\_\_\_  
\_\_\_\_\_
- Phone Number: \_\_\_\_\_

## Professional Advisors

- **Accountant**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email: \_\_\_\_\_
- **Banker**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone number: \_\_\_\_\_  
Email: \_\_\_\_\_
- **Financial Advisor**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email: \_\_\_\_\_

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## Summary of Financial Information

| <u>TOTAL ASSETS OWNED:</u>      | <u>BY YOU</u> | <u>BY SPOUSE</u> | <u>JOINTLY</u> |
|---------------------------------|---------------|------------------|----------------|
| Bank Accounts/CD's              | \$ _____      | \$ _____         | \$ _____       |
| Mutual Funds                    | \$ _____      | \$ _____         | \$ _____       |
| Bonds, Notes                    | \$ _____      | \$ _____         | \$ _____       |
| Stocks                          | \$ _____      | \$ _____         | \$ _____       |
| Real Estate                     | \$ _____      | \$ _____         | \$ _____       |
| Tangible Property               | \$ _____      | \$ _____         | \$ _____       |
| Annuities                       | \$ _____      | \$ _____         | \$ _____       |
| IRAs                            | \$ _____      | \$ _____         | \$ _____       |
| Retirement Plans                | \$ _____      | \$ _____         | \$ _____       |
| Life Insurance                  | \$ _____      | \$ _____         | \$ _____       |
| <b>GROSS ESTATE</b>             | \$ _____      | \$ _____         | \$ _____       |
| <u><b>TOTAL LIABILITIES</b></u> |               |                  |                |
| Total Indebtedness              | \$ _____      | \$ _____         | \$ _____       |
| <b>TOTAL NETWORTH</b>           | \$ _____      | \$ _____         | \$ _____       |

## Existing Estate Plan

- Do you have an existing will? Yes or No  
If yes, what is the date of the will? \_\_\_\_\_
- Do you have any trusts? Yes or No
- Do you own any real estate outside the State of Nebraska? Yes or No.

## Additional Information

Please attach/provide any additional documentation you think may be helpful in reviewing your estate plan.