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FINANCIAL INFORMATION ESTATE PLANNING

The beginning of the estate planning process is making a list of what you own. Many people are intimidated by this process because they think they need to be precise. Initially, however, precision is not required. You know the answers to these questions well enough off the top of your head to fill in this questionnaire. Grand totals by categories are all that are needed. Then if you take it to an attorney or financial planner, they can assist you to determine if more precision is needed in any area. If you find in filling it out that you are unsure of the information about how property is titled or who the beneficiaries are, you probably should look up the information or bring the documents relevant to that information with you to the meeting with the professional.

Asset	How Titled	Market Value	Debt or Mortgage
House Address:			
Cabin Address:			
Other Real Estate Address:			
Tangible Personal Property:			
Bank Accounts (No. _____)			
Securities – Marketable			
Securities – Closely Held			

Life Insurance (indicate name of insured, owner and beneficiary)			
Asset	How Titled	Market Value	Debt or Mortgage
IRA Accounts (indicate beneficiary)			
Pensions or Employee Benefits (indicate if any beneficiaries)			
Annuities (indicate if any beneficiaries)			
Trusts			
Partnerships			
Anticipated Inheritances			
Other Assets			
Other Major Liabilities			

Who do you want to make financial decisions for you if you are unable to do so?

First Choice: _____

Address: _____

Second Choice: _____

Address: _____