

EXAMPLE OF ESTATE INVENTORY FORM

This form is not as bad as it looks, and it could save you and your attorney valuable time. By filling out this form and bringing it to your first appointment, you will be providing your attorney with much of the information needed to draft an estate plan.

1. Name _____
Address _____

Phone (Work) _____ (Home) _____
Place and Date of Birth _____
Social Security Number _____ U.S. Citizen? _____
Single? ☐ Married? ☐ Widowed? ☐ Separated? ☐ Divorced? ☐

2. Spouse _____
Place and Date of Birth _____
Social Security Number _____ U.S. Citizen? _____

3. Children Age Address

(A) _____
(B) _____
(C) _____
(D) _____
(E) _____

4. Grandchildren Age Parent

(1) _____
(2) _____
(3) _____
(4) _____
(5) _____
(6) _____
(7) _____
(8) _____
(9) _____
(10) _____
(11) _____
(12) _____
(13) _____
(14) _____
(15) _____

The following is meant to give your attorney a good idea of the total value of your estate. Knowing your total worth is important to determine the type of estate plan that will keep your estate tax as low as possible.

5. REAL ESTATE INFORMATION

Description and location Market Value Debt

_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____