



TESSNEER LAW OFFICE
Attorneys at Law

ESTATE PLANNING WORKSHEET

Date: _____

1. Personal Information

Name _____
 Address _____

 County of Residence _____
 Home Phone _____
 Work Phone _____
 Cell Phone _____
 E-Mail _____
 Birth date _____ Age _____
 Employer _____
 Retirement Date _____
 Veteran: Yes _____ No _____
 U.S. Citizen: Yes _____ No _____
 Soc. Sec. No. _____

Spouse _____
 Address _____

 County of Residence _____
 Home Phone _____
 Work Phone _____
 Cell Phone _____
 E-Mail _____
 Birth date _____ Age _____
 Employer _____
 Retirement Date _____
 Veteran: Yes _____ No _____
 U.S. Citizen: Yes _____ No _____
 Soc. Sec. No. _____

2. Marital/Family Status

____ Single ____ Married with Children ____ Married without children ____ Divorced
 ____ Parents Living ____ Blended Family
 ____ Siblings Living ____ Children of Current Relationship
 ____ Widowed ____ Total Number of Children
 ____ Domestic Partner

3. Current Estate Plan

____ Will ____ Needs Updating
 ____ Trust
 ____ Revocable ____ Needs Updating
 ____ Irrevocable ____ Needs Updating
 ____ Health Care Directive ____ Needs Updating
 ____ Power of Attorney ____ Needs Updating
 ____ Transfer on Death Deed ____ Needs Updating

How did you hear about us? _____

4. **Real Property Interests.**

A. Address: _____

Names as they appear on the deed: _____

B. Address: _____

Names as they appear on the deed: _____

C. Address: _____

Names as they appear on the deed: _____

5. **Other Assets.**

Asset	Name of Owner	Name of Beneficiary
Checking Account		
Savings Account		
Money Market Account		
Certificate of Deposit		
Savings Bonds		
Treasury Notes		
Stocks		
Mutual Funds		
Life Insurance (Face)		
Retirement Accounts:		
IRA		
Pension		
Profit Sharing/401 (k)		
Annuities		

Client Satisfaction is our highest priority