

My Estate Planning Workbook



*A complimentary guide to help you
gather and organize the essential
information you will need
to complete your estate planning.*

*Please note: this is not a legal document. It is simply a tool for organizing
your information to share with your attorney and financial advisor
completing your estate plan. You might also find it helpful to share with
your family, power of attorney, trustee or estate executor.*

339 E. Jamestown Rd.
Greenville, PA 16125

724-588-7610
www.stpauls1867.org

MY PERSONAL INFORMATION

Date:

Full Legal Name:

Maiden/Previous Names:

Address:

City:

State:

Zip Code:

Phone:

Mobile:

Email:

Date of Birth:

Social Security Number:

Employer:

Job Title:

Date Retired:

Veteran?

Service Number:
(if applicable)

VA Number:

Service-Related Disability?

Details:

Marital Status:

Single

Married

Widowed

Divorced

Name of Spouse:

Date of Birth:

Social Security Number:

Veteran?

Service Number:
(if applicable)

VA Number:

Service-Related Disability?

Details:

Date Married:

Location Married:

Date Widowed:

PREVIOUS MARRIAGE:

Former Spouse:

Date Married:

Location Married:

Reason Marriage Ended:

Death

Divorce

Date:

MY FAMILY INFORMATION

List in order the family members you want to include in your estate plan.

1. Children 2. Grandchildren 3. Brothers/Sisters 4. Parents 5. Nieces/Nephews

MY IMPORTANT DOCUMENTS

Use this checklist to keep track of the existence and location of important documents.

Safe Deposit Box (SDB) Number:
Bank:
Fireproof Safe (FPS) Location:
Important File Location:

Key Location:
Authorized Access:
Combination/Key Location:
Box Location:

SDB	FPS	File	Box	Other Location	SDB	FPS	File	Box	Other Location
				Adoption Papers					Pre-Planned Funeral
				Annuity Contracts					Retirement Information
				Appraisals					Retirement Accounts
				Automobile Titles					Revocable Living Trust
				Bank Account Records					Social Security Information
				Benefit Statements					Stock Certificates
				Birth Certificates					Technology Login Info
				Bonds					Titles
				Cemetery Plot Deeds					Trust Agreements
				Citizenship Papers					Will
				Credit Card Statements					Other Documents:
				Death Certificates					
				Deeds					
				Divorce Decree					
				Income Tax Returns					
				Insurance Policies:					
				Accident					
				Auto					Advance Directives:
				Disability					Living Will
				Health					
				Life					DNR Order
				Long Term Care					Durable Power of Attorney
				Property					Healthcare Power of Attorney
				Lease Agreements					
				Marriage Certificates					Physician's Order for Life-Sustaining Treatment (POLST)
				Military Records					
				Mortgage Documents					
				Mutual Fund Shares					
				Nuptial Agreement					
				Other Securities					
				Passport					
				Pension Information					

MY ASSET INVENTORY

1. Real Estate (main residence, camp, vacation home, etc.)

Description of Property	Location	Purchase Cost	Current Value	Mortgage Owed	Current Value - Mortgage Owed Total Value

TOTAL APPROXIMATE VALUE:

2. Personal Belongings

Type of Property	Ownership	Current Value
Furniture/Furnishings		
Jewelry		
Antiques/Collections		
Artwork		
Tools & Equipment		
Musical Instruments		
Automobiles		
Firearms		

TOTAL APPROXIMATE VALUE:

3. Cash (checking accounts, savings accounts, certificates of deposit, etc.)

Bank	Address	Ownership	Value

TOTAL APPROXIMATE VALUE:

4. Stocks, Bonds and Mutual Funds

Company	Cost Basis	Ownership	Present Value

TOTAL APPROXIMATE VALUE:

5. Retirement Plans

Institution Name	Account #	Phone Number	Beneficiary	Amount

TOTAL APPROXIMATE VALUE:

6. Pension Plans

Institution Name	Account #	Phone Number	Beneficiary	Amount

TOTAL APPROXIMATE VALUE:

7. Deferred Compensation

Institution Name	Address	Ownership	Amount

TOTAL APPROXIMATE VALUE:

8. Annuities

Institution Name	Account #	Ownership	Amount

TOTAL APPROXIMATE VALUE:

9. Life Insurance

Company	Type of Policy	Policy Number	Beneficiary	Amount

TOTAL APPROXIMATE VALUE:

10. Business Agreements (relating to interests in corporations, partnerships & sole proprietorships)

Type	Company	Address	Value

TOTAL APPROXIMATE VALUE:

11. Money Owed to You (from personal loans, mortgages, rental agreements, etc.)

With Whom	Address	Type of Debt	Current Value

TOTAL APPROXIMATE VALUE:

TOTAL OF ALL ASSETS:

MY DEBT INVENTORY (Do not include mortgages as these are already accounted for in your Real Estate Asset Inventory. Include any other debts such as credit cards and personal loans.)

Company	Account Number	Address	Type of Debt	Amount

TOTAL DEBTS:

MY ESTATE SUMMARY

Real Estate Total:

Personal Belongings Total:

Cash Total:

Stocks, Bonds, Mutual Funds Total:

Retirement Plans Total:

Pensions Total:

Deferred Compensation Total:

Annuities Total:

Life Insurance Total:

Business Agreements Total:

Money Owed to You Total:

Total Assets:

Less Debts:

NET ESTATE VALUE:

MY LIFE INCOME INFORMATION

Charitable Trust

With Whom:

Trustee:

Assets in Trust:

Charitable
Beneficiaries:

Income
Recipients:

Testamentary Trust

With Whom:

Trustee:

Assets in Trust:

Beneficiaries:

Income
Recipients:

Charitable Gift Annuity

With Whom:

Present Value:

Charitable
Beneficiaries:

Income
Recipients:

Living Trust

With Whom:

Trustee:

Assets in Trust:

Beneficiaries:

Income
Recipients:

Revocable Trust

With Whom:

Trustee:

Assets in Trust:

Beneficiaries:

Income
Recipients:

Pooled Income Fund

With Whom:

Present Value:

Charitable
Beneficiaries:

Income
Recipients:

MY CHARITABLE INTERESTS

You may want to include a gift for your favorite charities in your estate plan. If St. Paul's has made a positive difference in your life, we hope you will consider making a **legacy gift**.

Yes! I'd like to make a legacy gift to St. Paul's.

For your convenience, this is the information you will need:

Organization's Legal Name:

Address:

Tax ID:

Amount:

Percentage:

For more information:

Dawn Hartman

St. Paul's

Phone: 724-588-9613 ext. 1214

Email: dhartman@sp1867.org

Yes! I want to make a legacy gift to the following organizations:

1. Organization's Legal Name:

3. Organization's Legal Name:

Address:

Address:

Tax ID:

Tax ID:

I wish to give the following:

I wish to give the following:

Amount:

Amount:

Percentage:

Percentage:

2. Organization's Legal Name:

4. Organization's Legal Name:

Address:

Address:

Tax ID:

Tax ID:

I wish to give the following:

I wish to give the following:

Amount:

Amount:

Percentage:

Percentage:

MY ESTATE DISTRIBUTION

An executor is the person you appoint to carry out the terms of your will. If you do not name an executor in your will, the court will appoint one.

Executor:

Address:

Phone Number:

Alternate Executor:

Address:

Phone Number:

SPECIFIC BEQUESTS

Do you want to leave certain personal property, real estate or assets to specific individuals or organizations? Those will need to be listed in your will. You can use this worksheet to compile them here.

1. Beneficiary:

Birthdate:

Relationship:

Address:

Bequest:

Amount:

Percentage:

Remainder of Estate

Specific Item(s):

2. Beneficiary:

Birthdate:

Relationship:

Address:

Bequest:

Amount:

Percentage:

Remainder of Estate

Specific Item(s):

SPECIFIC BEQUESTS (continued)

3. Beneficiary:	Birthdate:	Relationship:
Address:		
Bequest:	Amount:	Percentage:
		Remainder of Estate
Specific Item(s):		

4. Beneficiary:	Birthdate:	Relationship:
Address:		
Bequest:	Amount:	Percentage:
		Remainder of Estate
Specific Item(s):		

5. Beneficiary:	Birthdate:	Relationship:
Address:		
Bequest:	Amount:	Percentage:
		Remainder of Estate
Specific Item(s):		

6. Beneficiary:	Birthdate:	Relationship:
Address:		
Bequest:	Amount:	Percentage:
		Remainder of Estate
Specific Item(s):		

MY CHILDREN'S CARE

If you have minor children, you will want to name a guardian for them in your will. This person will be responsible for the care of your children and the property you willed to them. If you prefer, you can split these duties and appoint a guardian to care for your children and a trustee to handle the property/assets of the estate.

Guardian:

Relationship:

Address:

Phone Number:

Alternate Guardian:

Relationship:

Address:

Phone Number:

Trustee:

Relationship:

Address:

Phone Number:

Alternate Trustee:

Relationship:

Address:

Phone Number:

MY CELEBRATION OF LIFE PLANS

Funeral Home:

Phone Number:

Address:

Type of Service: Religious Humanist Fraternal Military Memorial Service

Funeral Instructions: Closed Casket Open Casket

Cremation Instructions:

Cemetery:

Gravesite:

Address:

Phone Number:

Minister:

Musicians:

Ushers:

Pallbearers:

Speakers:

Favorite Flowers:

Hymns:

Scripture/
Readings:

In lieu of flowers, please suggest memorial gifts to:

1. Organization:

Address:

2. Organization:

Address:

MY KEY ADVISORS

Minister:

Church:

Address:

Phone:

Email:

Attorney:

Office:

Address:

Phone:

Email:

Accountant:

Organization:

Address:

Phone:

Email:

Accountant:

Organization:

Address:

Phone:

Email:

Stockbroker:

Organization:

Address:

Phone:

Email:

Trust Officer:

Organization:

Address:

Phone:

Email:

Charitable Gift Planning Partner(s):

Dawn Hartman

Organization:

St. Paul's

Address:

339 E. Jamestown Rd., Greenville, PA 16125

Phone:

724-588-9613 ext. 1214

Email:

dhartman@sp1867.org

AND/OR

Name:

Organization:

Address:

Phone:

Email:

HELPFUL INFORMATION FOR MY FAMILY

Gas:

Phone:

Username:

Account Number:

Website:

Password:

Electric:

Phone:

Username:

Account Number:

Website:

Password:

Water:

Phone:

Username:

Account Number:

Website:

Password:

Phone:

Phone:

Username:

Account Number:

Website:

Password:

Waste Management:

Phone:

Username:

Account Number:

Website:

Password:

Cable/Satellite:

Phone:

Username:

Account Number:

Website:

Password:

Other:

Phone:

Username:

Account Number:

Website:

Password:

Other:

Phone:

Username:

Account Number:

Website:

Password:

MY NOTES

The logo features the text "ST. PAUL'S" in a large, blue, serif font, with a blue arch above it. Below this, the words "SENIOR LIVING COMMUNITY" are written in a smaller, black, sans-serif font. The background of the entire page is a complex geometric pattern of overlapping triangles in various shades of green and blue, with a solid olive green bar at the top and bottom.

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