

WELCOME TO THE LAW OFFICE OF JOHN L. ROBERTS
 1200 Converse Street, Longmeadow, Massachusetts 01106



TRUST & ESTATE PLANNING TEMPLATE for a MARRIED COUPLE

This Template will organize important information so we can identify your best options. You may not have all the information close at hand. Fill in the information that you do have.

Protect privacy; log off internet before entering your data.

Call to schedule an Educational Meeting, print out your Template, and bring it with you for our meeting.

Husband's Name: _____

Wife's Name: _____

Street Address: _____

City, State, Zip Code _____

Your Phone: _____ **Cell:** _____

Your Email: _____

Today's Date: _____

[Printing Options](#)

[Effective Communication with Your Attorney](#)

People	Professional Planning Team	Property & Assets	Your Plan and Legacy	Income & Resources
People	<i>In this section, please list all of your children and / or the people who are most closely related to you.</i>			
Name of Relative	Street Address,	City,	State Zip Code	Relationship Date of Birth

Were you previously married? | Husband: YES NO | Wife: YES NO | Is Previous Spouse Deceased?
 If Divorced, Year of Divorce: _____ Name of Previous Spouse: _____

Professional Planning Team	Do you have professional advisors?
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An Accountant, CPA or Tax Preparer?

Name: _____
 Address: _____
 Phone: _____

A Financial Advisor or other financial professional?

Name: _____
 Address: _____
 Phone: _____

A securities broker? Brokerage Firm?

Name: _____
 Address: _____
 Phone: _____

An insurance agent?

Name: _____
 Address: _____
 Phone: _____



Property & Assets

YES NO **Do you own a residence, vacation home and /or other Real Estate?**

Please list the information about your real estate, including the \$ value owned individually by Husband(H) by Wife (W), or Jointly (J).



Real Estate Location, Address	Husband Owned Value	Wife Owned Value	Jointly Owned Value
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TOTALS Husband _____ Wife _____ Joint _____

Your bank account information. Please list all of your bank accounts, including \$ balance amounts owned by Husband (H), Wife (W) or Jointly (J):



Bank Name & Type of Acct (Chk'ng, Savings, CD)	Husband Owned Amnt	Wife Owned Amnt	Jointly Owned Amnt
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TOTALS Husband _____ Wife _____ Joint _____

Current Total Bank Accounts _____

YES NO **Do you own a Traditional IRA, Roth IRA, Qualified Plan, 401k, 403(b) or other retirement accounts?**

Please list values for the account owner, Husband or Wife:



Custodian of Account, Type of Retirement Plan, and beneficiary designations	Husband Owned Value	Wife Owned Value
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TOTALS Husband _____ Wife _____

Total Current Value of IRA, 401k and other Retirement Plans _____



Property & Assets

YES NO *Do you own any annuities?*

Please list whether owned by Husband (H) or Wife (W) or Joint Ownership (J), and:

Financial Institution, term of annuity, beneficiary	Surrender Value H	Surrender Value W	Surrender Value Joint
TOTALS	Husband _____	Wife _____	Joint _____
Total Cash Surrender Value of Annuities _____			

YES NO *Do you own any securities accounts, individual stocks, or, mutual funds?*

Please list values owned individually by Husband, Wife, or Joint Ownership



Number of Units, Name of Security	Securities Value H	Securities Value W	Securities Value Joint
TOTALS	Husband _____	Wife _____	Joint _____
Total Current Value of Securities _____			

YES NO *Do you own any corporate, municipal or US Savings bonds?*

Please list whether owned by Husband (H) or Wife (W) or Jointly (J), and:



Denomination, Description, Beneficiary Designations	Bonds Value H	Bonds Value W	Bonds Value Joint
TOTALS	Husband _____	Wife _____	Joint _____
Total Current Value of Bonds _____			



Property & Assets

YES NO **Do you own life insurance policies? Please list the name of the insurance company type of insurance, name of the person whose life is insured, and who owns the policy by indicating the death benefit as part of the estate of Husband(H) or Wife (W).**
WL = Whole Life; G = Group Term; T = Term; UL = Universal Life;
SPWL = Single premium Whole Life; SL = Survivorship Life

Insurance Company, Type of Policy, Name of Insured Beneficiary	H Owned Death Benefit	W Owned Death Benefit
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TOTALS Husband _____ Wife _____

Total Death Benefit Value of Insurance Policies: _____

YES NO **Do you have a substantial amount of cash on hand? Please list the amount of cash, and location.**

Total Cash on Hand: _____



YES NO **Do you own, or have access to a safe deposit box? If Yes: list the location and contents of the safe deposit box. Is the safe deposit box owned jointly with another person?**

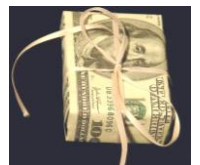


YES NO **Do you own an interest in a partnership, an unincorporated business, or stock in an inactive or closely held corporation?**



Total Value of Business: Husband _____ Wife _____ Joint _____

YES NO **Did you make any gifts or transfers during the past three years involving more than \$14,000.00? If YES, please list the \$ amount of each gift, and the name of person(s) who received each gift or transfer:**



YES NO **Have you ever filed any Gift Tax Returns? Please list the year(s): Attach photocopies of each Form 709 Gift Tax Return.**



Property & Assets

YES NO **Do you own motor vehicles?**

Please list the value and whether owned by Husband or Wife or Jointly Owned:



Year, make, model	H Owned Vehicle	W Owned Vehicle	Jointly Owned Vehicle
TOTALS	Husband _____	Wife _____	Joint _____
Total Current Value of Motor Vehicles _____			

YES NO **Do either of you own any other types of property, such as Oil And Gas Interests, Literary And Artistic Rights, Patents, Copyrights, And Trademarks, Claims, Any Right Of Action or Lawsuit pending or possible in the future? If Yes, please describe:**

YES NO **Do either of you own articles of artistic or collectable value? Please list each item in the collection.**

YES NO **Do either of you have Joint Ownership of bank accounts, real estate or any other type of property that are not mentioned above? If Yes: describe the property and list name and address of the joint owner(s):**

YES NO **Do either of you own bank accounts, real estate or any other type of property not mentioned above as a Life Tenant or lifetime owner? If Yes: describe the property and list name and address of the joint owner(s) or remainder owner(s):**

YES NO **Do either of you owe any money to anyone?**
If Yes: list unpaid bills, loans, credit card balances, mortgages, and whether owed by Husband (H), Wife (W) or Jointly (J), along with:



Lender, Mortgage Holder, Creditor	Husband's Debt Amount	Wife's Debt Amount	Joint Debt Amount
Enter each debt as a negative number , using the – minus sign			
TOTALS	Husband _____	Wife _____	Joint _____



TOTAL ASSETS Husband _____ Wife _____ Joint _____
LESS Debts and Liabilities Husband _____ Wife _____ Joint _____
BALANCE Husband _____ Wife _____ Joint _____

Including current value of bonds and value of life insurance death benefits

TOTAL ASSETS: _____

LESS LIABILITIES: _____

BALANCE: _____

Your Plan and Legacy

YES NO **Do you have Powers of Attorney?**

List the year you signed the POA, and the Person designated to manage your financial affairs:

Husband _____

Wife _____

YES NO **Do you have Health Care Proxies?**

List the year you signed the Proxies and name of the Agent you designated to manage your health care:

Husband _____

Wife _____

YES NO **Do you have Wills?**

List the year you signed the Will and who is Personal Representative and Alternate Personal Representative who will manage your estates:

Husband _____

Wife _____

YES NO **Have you created any Trusts?** List Trustee(s) and Beneficiaries:



YES NO **Are there any Trusts that were not created by you, but which give you a power, a beneficial interest, or a trusteeship?**

Husband _____

Wife _____

YES NO **Are you the beneficiary of a Trust that claimed a tax deduction by an estate of a pre-deceased spouse?**

Husband _____

Wife _____

YES NO **Do you possess, exercise, or release a power of appointment (ability to influence ownership) over assets or property of other people?**

Husband _____

Wife _____



	Income & Resources
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Employment Income, Social Security Retirement or other government pension	Husband	Wife
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TOTALS Husband _____ Wife _____

Total Monthly Employment, Social Security, or Government Pension _____

IRA, 401k, annuity income	Husband	Wife
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TOTALS Husband _____ Wife _____

Total Monthly Retirement Plan Income _____

Income from stocks or bonds, bank interest, other sources	Husband	Wife	Joint Income
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TOTALS Husband _____ Wife _____ Joint _____

Total Monthly Dividend & Interest Income _____

YES NO Are you a Veteran? List years of service and indicate whether you receive any Veterans' Benefits:

Husband: _____

Wife: _____

Total Monthly VA Income _____ Attach copies of discharge, account statements.

YOUR TOTAL MONTHLY INCOME _____