

## ESTATE & BUSINESS LAW GROUP PC

# ESTATE ADMINISTRATION PLANNING GUIDE

The purpose of this Estate Administratoin Planning Guide is to help you begin to organize your loved one's estate. This information will provide us with the important details necessary to properly counsel you regarding the estate administration process.

If you have any questions, please call our Client Services Director, Mary, at (847) 367-4460.

ESTATE & BUSINESS LAW GROUP PC

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## FAMILY INFORMATION

Decedent ("D")	Surviving Spou	ise ("SS") NONE		
First Name:	First Name:			
Middle Name:	Middle Name:			
Last Name:	Last Name:			
Birth Date:/	Birth Date:	/		
SSN:	SSN:			
Employer:	Employer:			
Occupation:	Occupation:			
Home Phone:	Home Phone:			
Work Phone:	Cell Phone:			
Cell Phone:				
E-Mail:				
Date of Marriage:/	Date of Marriage:	/		
Any Prior Marriages? ☐ Yes ☐ No U.S. Citizen? ☐ Yes ☐ No Military Service? ☐ Yes ☐ No If yes, branch and service dates:	Any Prior Marriage: U.S. Citizen? Military Service? If yes, branch and	□ Yes □ No		
Home Address:				
Street Alternate Address:	City Sto	ate Zip		
Street	City Sto	ate Zip		

#### FAMILY INFORMATION (Continued)

Children/Descendants: Include any additional information in the NOTES section below. 1<sup>st</sup> Child's Name: Check all that apply: ☐ Adopted ☐ Creditor Issues First Middle Last ☐ Deceased ☐ Special Needs U.S. Citizen? *Child of:* □ Joint □ D Birthday: \_\_\_\_/\_\_\_\_ ☐ Married. Spouse's Name: ☐ Children. Names and Ages: 2<sup>nd</sup> Child's Name: Check all that apply: ☐ Adopted ☐ Creditor Issues First Middle ☐ Deceased ☐ Special Needs Last U.S. Citizen? *Child of:* □ Joint □ D Address:\_\_\_\_\_ □ Yes □ No *Birthday*: \_\_\_\_/\_\_\_ ☐ Married. Spouse's Name: ☐ Children. Names and Ages: \_\_\_\_\_ 3<sup>rd</sup> Child's Name: Check all that apply: ☐ Adopted ☐ Creditor Issues First Middle Last ☐ Deceased ☐ Special Needs U.S. Citizen? *Child of:* □ Joint □ D Address: Yes No *Birthday*: \_\_\_\_/\_\_\_ ☐ Married. Spouse's Name: ☐ Children. Names and Ages: \_\_\_\_\_ 4<sup>th</sup> Child's Name: Check all that apply: ☐ Adopted ☐ Creditor Issues Middle ☐ Deceased ☐ Special Needs First Last U.S. Citizen? *Child of:* □ Joint □ D Address: □ Yes □ No Birthday: / / ☐ Married. Spouse's Name: ..... ☐ Children. Names and Ages: Other Dependents: Please list any other persons who are dependent upon you. 1<sup>st</sup> Dependent's Name: ☐ Creditors issues Middle Last First ☐ Special Needs Birthday:\_\_\_\_/\_\_\_\_ Relationship: 2<sup>nd</sup> Dependent's Name: ☐ Creditors issues Middle First Last ☐ Special Needs Birthday:\_\_\_\_/\_\_\_\_/\_\_\_\_ Relationship:

### **IMPORTANT QUESTIONS** YES NO Did the decedent have an existing will or trust? (If yes, please provide copies) Are any of the decedent's assets legally held by, or payable to, your trust? Do any heirs receive government benefits because of a disability? Any pre-/post- marital agreement? (If yes, please provide copies) Any obligations under a prior divorce agreement? (i.e. child support) Was decedent enrolled in the VA system? Did decedent make any substantial gifts in the past? (Please explain) If you have answered "YES" to any of these questions or have any special concerns, please share any details that you think would be helpful below:

Decedent's Professional Advisors:	
Accountant:	Phone:
Financial Advisor:	Phone:
Stock Broker:	Phone:
Life Insurance Agent:	Phone:
Banker:	Phone:
<b>Assets:</b> The following pages of this Estate Administrate and organize the assets that make up the disection as thoroughly as possible, as this information appropriate plan for the estate.	ecedent's estate. Please complete this
1) Bank/Cash Accounts	
2) Taxable Investment Accoun	nts (non-IRA or 401(k))
3) Stocks/Bonds <u>NOT</u> Held in a	an Account (You hold the certificate)
4) Retirement Plans/IRAs/401	(k)
5) Life Insurance/Annuities	
6) Real Property (Land)	
7) Personal Effects & Other As	ssets
8) Business Interests	

Name of Bank	Account Type	Ownership	Est. Balance
	☐ Checking	□D □SS	
	□ Savings	□ Joint (D&SS)	
	□ CD	□ Joint (Other)	
Account #	🗆 Money Market	□ Trust	\$
	☐ Checking	□D □SS	
	□ Savings	□ Joint (D&SS)	
	□ CD	□ Joint (Other)	
Account #	🗆 Money Market	□ Trust	\$
	☐ Checking	□D □SS	
	□ Savings	□ Joint (D&SS)	
	□ CD	□ Joint (Other)	
Account #	🗆 Money Market	☐ Trust	\$
	☐ Checking	□D □SS	
	□ Savings	□ Joint (D&SS)	
	□ CD	□ Joint (Other)	
Taxable Investmer	•	•	•
Account #  Taxable Investmer  Name of Financial Institution	nt Accounts (non Account Type	-IRA or 401(k) Ownership	
Taxable Investmer	nt Accounts (non  Account Type	-IRA or 401(k)  Ownership  □ D □ SS	))
Taxable Investmer	nt Accounts (non  Account Type  Stocks/Bonds Options	-IRA or 401(k)  Ownership  D SS  Joint (D&SS)	))
Taxable Investmer	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives	-IRA or 401(k)  Ownership  D DSS Doint (D&SS) Doint (Other)	))
Taxable Investmer	nt Accounts (non Account Type  Stocks/Bonds Options Derivatives Partnerships	-IRA or 401(k)  Ownership  D SS  Joint (D&SS)  Joint (Other) Trust	))
Taxable Investmer	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds	-IRA or 401(k)  Ownership  D SS  Joint (D&SS)  Joint (Other) Trust D SS	))
Taxable Investmer	Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options	-IRA or 401(k)  Ownership  D SS Doint (D&SS) Doint (Other) Trust D SS Joint (D&SS)	Est. Balance
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Taxable Investmer Name of Financial Institution Account #	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships	-IRA or 401(k)  Ownership  D SS Joint (D&SS) Joint (Other) Trust D SS Joint (D&SS) Joint (D&SS) Joint (D&SS) Trust	Est. Balance
Taxable Investmer Name of Financial Institution Account #	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Stocks/Bonds	-IRA or 401(k)  Ownership  D SS  Joint (D&SS)  Joint (Other)  Trust  D SS  Joint (D&SS)  Joint (D&SS)  Trust  Trust  D SS	Est. Balance
Taxable Investmer Name of Financial Institution Account #	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds	-IRA or 401(k)  Ownership  D SS Joint (D&SS) Joint (Other) Trust D SS Joint (D&SS) Joint (D&SS) Trust Joint (Other) Trust Joint (Other) Trust	\$\$
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Taxable Investmer Name of Financial Institution  Account #	nt Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Derivatives Partnerships Partnerships Stocks/Bonds Partnerships Partnerships	-IRA or 401(k)  Ownership  D SS Joint (D&SS) Joint (Other) Trust D SS Joint (D&SS) Joint (D&SS) Joint (D&SS) Joint (Other) Trust	\$\$
Taxable Investmer Name of Financial Institution  Account #	Accounts (non  Account Type  Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Partnerships Stocks/Bonds Options Derivatives Partnerships Stocks/Bonds Options Options Options Options Options	-IRA or 401(k)  Ownership  D SS Joint (D&SS) Joint (Other) Trust D SS Joint (D&SS) Joint (Other) Trust D SS Joint (Other) Trust D SS Joint (D&SS) Trust D SS	\$\$

Company Name	# of Shares	Ownership	Est. Value
		□D □SS	
		□ Joint (D&SS)	
		□ Joint (Other)	
		☐ Trust	\$
		□D □SS	
		□ Joint (D&SS)	
		□ Joint (Other)	
		☐ Trust	\$
		□D □SS	
		☐ Joint (D&SS)	
		□ Joint (Other)	
		☐ Trust	\$
		□D □SS	
		□ Joint (D&SS)	
		□ Joint (Other)	
		□ Trust	\$
Retirement Plans/			1
•	Account Type	Ownership	Est. Balance
•	Account Type  ☐ Pension	□D □SS	Est. Balance
•	Account Type  □ Pension □ 401(k)	□ D □ SS □ Joint (S1&S2)	Est. Balance
Name of Financial Institution	Account Type  ☐ Pension ☐ 401(k) ☐ IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other)	
lame of Financial Institution	Account Type  ☐ Pension ☐ 401(k) ☐ IRA/SEP ☐ Profit Sh.	□ D □ SS □ Joint (S1&S2)	Est. Balance
Name of Financial Institution	Account Type  ☐ Pension ☐ 401(k) ☐ IRA/SEP ☐ Profit Sh. ☐ Keogh	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust	
Name of Financial Institution	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust	
Name of Financial Institution	Account Type  Pension  401(k)  IRA/SEP Profit Sh. Keogh Pension 401(k)	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS)	
Name of Financial Institution  Account #	Account Type  Pension  401(k)  IRA/SEP Profit Sh. Keogh Pension 401(k)  IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other)	\$
Name of Financial Institution  Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension 401(k) IRA/SEP Profit Sh.	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS)	
Name of Financial Institution  Account #	Account Type  Pension  401(k)  IRA/SEP Profit Sh. Keogh Pension 401(k) IRA/SEP Profit Sh.	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$
Name of Financial Institution  Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension IRA/SEP IRA/SEP Frofit Sh. Reogh Pension Pension Pension Pension Pension	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$
Name of Financial Institution  Account #	Account Type  Pension  401(k)  IRA/SEP Profit Sh. Keogh Pension INA/SEP INA/SEP Pension A01(k) IRA/SEP Profit Sh. Keogh A01(k) A01(k) A01(k) A01(k) A01(k) A01(k) A01(k)	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (Other) □ Trust	\$
Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension IRA/SEP Profit Sh. IRA/SEP Profit Sh. IRA/SEP IPROFIT Sh. IRA/SEP IRA/SEP IRA/SEP IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (D&SS) □ Joint (D&SS)	\$\$
Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension IRA/SEP Profit Sh. IRA/SEP Profit Sh. IRA/SEP IPROFIT Sh. IRA/SEP IRA/SEP IRA/SEP IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (Other) □ Trust	\$
Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension INA/SEP Profit Sh. Keogh IRA/SEP Profit Sh. IRA/SEP INA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (D&SS) □ Joint (D&SS)	\$\$
Account #	Account Type  Pension 401(k) IRA/SEP Profit Sh. Keogh Pension IRA/SEP Profit Sh. IRA/SEP Profit Sh. IRA/SEP Profit Sh. IRA/SEP Profit Sh. Keogh Pension IRA/SEP Fension IRA/SEP Reogh IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (D&SS) □ Joint (D&SS) □ Joint (Other) □ Trust	\$\$
Account #	Account Type  Pension  401(k)  IRA/SEP  Profit Sh.  Keogh  Pension  401(k)  IRA/SEP  Profit Sh.  Keogh  IRA/SEP  Profit Sh.  Keogh  Pension  Hension  Hension  Hension  Pension  Pension  Pension  Pension  Pension  Pension  Pension	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (Other) □ Trust	\$\$
Name of Financial Institution  Account #	Account Type  Pension 401(k) IRA/SEP Frofit Sh. Keogh Pension IRA/SEP Profit Sh. Keogh IRA/SEP Profit Sh. Keogh IRA/SEP Frofit Sh. Keogh Pension A01(k) IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP IRA/SEP	□ D □ SS □ Joint (S1&S2) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust □ D □ SS □ Joint (D&SS) □ Joint (D&SS) □ Joint (D&SS) □ Joint (Other) □ Trust	\$\$

Life Insurance/Annu	irie2			
Name of Company	Insured		Ownership	Est. Value
	$\Box$ D $\Box$ SS		□D □SS	
	_ □ Other:		,	
Policy #	Name:			
Type: □ Permanent □ Term	•••••••		□ Trust	
	□ D □ SS			
	_ □ Other:		•	
Policy #	Name:			
Type: ☐ Permanent ☐ Term	□ D □ SS		☐ Trust ☐ D ☐ SS	
	□ Other:			
Policy #	_		,	
Type: □ Permanent □ Term			☐ Trust	
.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
	Othor.			
Policy #			☐ Joint (Other)	
Type: □ Permanent □ Term			□ Trust	\$
Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Prope				
☐ Rental Property ☐ Time Share		☐ Joint☐ Joint☐ Trus☐ Entit	t (D&SS) t (Other) t/Land Trust ty:	Mortgage:  \$  Fair Market Value:  \$
□ Rental Property □ Time Share		□ Join □ Join □ Trus	t (D&SS) t (Other) t/Land Trust ty:	\$ Fair Market Value:
☐ Rental Property ☐ Time Share  Address:		□ Join □ Join □ Trus □ Enti Name:	t (D&SS) t (Other) st/Land Trust ty:	\$ Fair Market Value: \$
□ Rental Property □ Time Share  Address: □ Primary Residence	erty	□ Join	t (D&SS) t (Other) ot/Land Trust ty:	\$Fair Market Value: \$ Mortgage:
□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence	erty	□ Join □ Join □ Trus □ Enti □ Name: □ D □	t (D&SS) t (Other) st/Land Trust ty: SS t (D&SS)	\$ Fair Market Value: \$
□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Prope	erty	□ Joint □ Joint □ Trus □ Entit Name: □ D □ □ Joint □ Joint	t (D&SS) t (Other) tt/Land Trust ty: SS t (D&SS) t (Other)	\$ Fair Market Value: \$ Mortgage: \$
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□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Prope	ce	□ Join □ Join □ Trus □ Enti  Name: □ D □ □ Join □ Join □ Trus □ Enti	t (D&SS) t (Other) st/Land Trust ty: SS t (D&SS) t (Other) st/Land Trust ty:	\$ Fair Market Value: \$ Mortgage: \$ Fair Market Value:
□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Property □ Rental Property □ Time Share	ce	□ Join □ Join □ Trus □ Enti  Name: □ D □ □ Join □ Join □ Trus □ Enti	t (D&SS) t (Other) st/Land Trust ty: SS t (D&SS) t (Other) st/Land Trust ty:	\$ Fair Market Value: \$ Mortgage: \$ Fair Market Value:
□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Property □ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence	ce	□ Join □ Join □ Trus □ Enti  Name: □ D □ □ Join □ Trus □ Enti  Name: □ D □ □ Join	t (D&SS) t (Other) st/Land Trust ty: SS t (D&SS) t (Other) st/Land Trust ty: SS t (Other) st/Land Trust ty: SS t (D&SS)	\$ Fair Market Value: \$ Mortgage: \$ Fair Market Value: \$
□ Rental Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Property □ Time Share  Address: □ Primary Residence □ Secondary (Vacation) Residence □ Secondary (Vacation) Residence □ Vacant Land/Investment Property	ce	□ Join □ Join □ Trus □ Enti  Name: □ D □ □ Join □ Trus □ Enti  Name: □ D □ □ Join □ Inti □ Join □ Join □ Join	t (D&SS) t (Other) st/Land Trust ty: SS t (D&SS) t (Other) st/Land Trust ty: St/Land Trust ty: St/Land Trust ty: SS t (D&SS)	\$ Fair Market Value: \$ Mortgage: \$ Fair Market Value: \$ Mortgage: \$
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#### Personal Effects & Other Assets

Personal items such as motor vehicles, boats, jewelry, collections, antiques, artwork, and all other valuable non-business personal property.

Description	Ownership	Loan Amount	Est. Value
	□ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$	\$
	□ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$	\$
	□ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$	\$
	□ D □ SS □ Joint (D&SS) □ Joint (Other) □ Trust	\$	\$
NOTES: Please use the space below there was not sufficient space in a		al information you feel is	relevant, or if
Attachment Checklist: Please make Copy of death certificate Copies of current wills and Copies of powers of attor Copies of all premarital age Copies of deeds to real est Copies of latest financial age Copies of corporate recor	ed trusts ney (property & healtho greements and/or divor state account statements	care)	ıments:

\* If decedent owned a business, please complete the following Business Interest section. Please report any assets owned by the business below.

Confidentiality & Attorney-Client Relationship: All information submitted to the Estate & Business Law Group, PC will be kept confidential, regardless of whether you engage us to prepare your estate plan or not. The completion of this Estate Administration Planning Guide and its submission to the Estate & Business Law Group, PC, however, does not create an attorney-client relationship. An attorney-client relationship will only be established upon the execution of a fee agreement by you and the Estate & Business Law Group, PC for the provision of estate administration services.

siness Name: pe:	Ownership:	
☐ Corporation		Percentage Owned:
☐ Limited Liability Company	☐ Joint (D&SS)	# of Ownser
<ul><li>□ Partnership</li><li>□ Sole Proprietorship</li></ul>	□ Joint (Other) □ Trust	# of Owners:
☐ Other:	_ □ Business	Est. Value:
siness is:		
□ manufacturing □ distributor Industry:		
Special licenses:		
Describe business:		