**YOUR ESTATE PLANNING LIST**

***Please enter the information that best fits your estate planning needs***

**WHO DO YOU WANT TO LEAVE GIFTS TO IN YOUR WILL?**

**BENEFICIARIES (Family, Friends, Charities)**Name:  
Address:  
  
  
Name:   
Address:  
  
  
Name:  
Address:  
  
  
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Name:  
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Name:   
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Name:  
Address:  
  
  
Name:   
Address:

**WHAT IS IN YOUR ESTATE?**

**What do you want to gift to your family, friends or charities?**

**Note whether any apartments are Cooperatives or Condominiums**

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**WHO WILL HANDLE YOUR AFFAIRS?**

**EXECUTOR (of your Will)**  
Name:

Address:

ALTERNATE (back up)  
Name:

Address:  
  
  
**TRUSTEES (for Testamentary Trusts, Special Needs and other Living Trusts)**Name:

Address:

ALTERNATE (back up)  
Name:

Address: **ATTORNEY IN FACT = POWER OF ATTORNEY**Name:

Address:

ALTERNATE (back up)  
Name:

Address:  
  
**GUARDIAN FOR MINORS (through Surrogate or Family court)**  
Name:

Address:

ALTERNATE (back up)  
Name:

Address:  
  
  
  
***Be sure to obtain current/accurate names, addresses, phone numbers and email addresses***

**LIST ANY PROFESSIONALS WHO SHOULD BE CONTACTED TO ASSIST WITH HANDLING YOUR AFFAIRS? (only those that apply to your situation)**

**ACCOUNTANT**Name:  
  
Address:  
  
  
  
**BANK (banker)**Name:  
  
Address: **LIFE INSURANCE AGENT/COMPANY**Name:  
  
Address:  
  
  
  
**REAL ESTATE AGENT**Name:  
  
Address:  
  
  
  
**NURSING HOME/AGENCY**Name:  
  
Address: **CHURCH**Name:  
  
Address:  
  
  
  
**FUNERAL HOME**Name:  
  
Address:  
  
  
  
**CEMETERY**  
Name:  
  
Address:

**- - - - END OF ESTATE PLANNING LIST - - - -**