

ROBERT C. BECK

Attorney at Law

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534 W. Roosevelt Rd.
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115 Campbell St., Suite L5
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One of the most valuable gifts you can leave to your heirs is a well-organized estate and accurate records of your important personal data. This form is intended to provide an organized structure for you to record important personal data.

PERSONAL AND FINANCIAL ESTATE PLANNING SUMMARY

Personal History

1	Your full legal name (including maiden name):	
2	Address:	
3	City, State, Zip:	
4	Telephone Number:	
5	Your home of record:	
6	Date of birth:	
7	Place of birth:	
8	Social Security number:	
9	The country of your citizenship, if other than the United States:	
10	Marital status (single, married, divorced, separated, widowed):	
11	Spouse's full legal name (including maiden name):	
12	Spouse's address (if different from your own):	
13	Spouse's date of birth:	
14	Spouse's place of birth:	
15	Spouse's Social Security number:	
16	The country of your spouse's citizenship, if other than the United States:	

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17	Date of marriage:	
18	Children's full legal names (including maiden and married names):	
19	Children's addresses and telephone numbers:	
20	Children's dates of birth:	
21	Father's full legal name:	
22	Mother's full legal name (including maiden name):	
23	Grandchildren's full legal names (including maiden and married names):	

Wills

1	Location of original will and any codicils:	
2	Date of will and any codicils:	
3	Name, address, and telephone number of attorney who prepared will:	
4	Name, address, and telephone number of executor/executrix:	

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Trusts

1	Location of any trusts:	
2	Date of trust:	
3	Name, address, and telephone number of attorney who prepared trust:	
4	Name, address, and telephone number of trustees:	

Financial Power of Attorney

1	Name of agent:	
2	Address and telephone number of attorney-in-fact (agent):	
3	Location of original power of attorney:	

Medical Power of Attorney

1	Name of agent:	
2	Address and telephone number of agent:	
3	Location of power of attorney:	

Living Will

1	Location of living will:	
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Additional Contacts

1	Attorney name, address, and telephone number:	
2	Accountant name, address, and telephone number:	
3	Doctor name, address, and telephone number:	

Military Service

1	Branch of service:	
2	Dates of service:	
3	Rank:	
4	Service number:	
5	Date of discharge:	
6	Type of discharge:	
7	Service-connected disabilities (_____%):	
8	Pension and retirement information is located:	

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Employment

1	Present employer:	
2	Present work address:	
3	Present work telephone number:	
4	Date of employment:	
5	Your position:	
6	Your employment benefits (life insurance plans, stock options, pension plans, profit-sharing plans) (Include contact information for each):	

Real Estate

1	Address of real estate currently owned:	
2	How the real estate is owned (sole owner, jointly)?	
3	If property is owned jointly, names and addresses of other owners:	
4	Real estate purchase price:	
5	Date real estate purchased:	
6	Mortgage or deed of trust held by:	
7	Current loan amount:	
8	Location of deeds, deeds of trust, title insurance, title abstracts:	

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Financial Accounts

1	Name of bank or financial institution:	
2	Account number(s):	
3	Type of account (checking, savings, certificate of deposit, money market, Individual Retirement Account):	
4	Current balance:	
5	Name of owner of account (Provide all joint owners' names and addresses):	

Stocks and Bonds

1	Investment broker name, address, and telephone number:	
2	Type of asset (stocks, bonds, mutual fund):	
3	Account number, certificate number or serial number:	
4	Purchase price:	
5	Current value:	
6	Maturity date, if applicable:	
7	Location of certificates or bonds:	
8	Name of owner of accounts or certificates (Provide all joint owners' names and addresses):	

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Automobiles

1	Make, model, and year:	1.	2.
2	Location of title:		
3	Loan amount:		
4	Name of holder of loan and address:		
5	Name of owner (Provide all joint owners' names and addresses):		

Business Interests

1	Type of business (sole proprietorship, partnership, limited liability company, corporation):	
2	Type and amount of ownership (sole owner, shares, membership interest):	
3	Estimated value of business or share of ownership interest:	
4	Name, address, and telephone number of business contacts (CPA, attorney, manager, president):	

Titled Assets

1	Description of asset (boats, RVs, trailers, etc.):	
2	Location of asset:	
3	Location of title to asset:	
4	Purchase price of asset:	
5	Current value of asset:	
6	Name of owner (Provide all joint owners' names and addresses):	

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Safe-Deposit Boxes

1	Location of safe-deposit box:	
2	Location of key:	
3	Names and addresses of individuals with signature access to box:	

Insurance Policies

1	Type of policy (life, health, disability, automobile, homeowners, renters):	
2	Policy number:	
3	Name, address, and telephone number of insurance agent:	
4	Amount of coverage:	
5	Location of insurance policy:	

Tax Returns

1	Location of filed tax returns:	
2	Name, address, and telephone number of individual or company who prepared tax returns:	

Important Personal Friends

1	The following individuals should be notified of my death:	
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Funeral/Burial Instructions

1	Instructions for burial or cremation:	
2	Cemetery name and address and lot numbers, if applicable:	
3	Location of deed to cemetery lot, if applicable:	
4	Name and address of memorial gifts, if applicable:	
5	Special wishes for ceremony:	
6	Provide a copy of any prepaid funeral policy, if applicable.	

Special or Personal Notations: _____

Message from Robert C. Beck, Attorney at Law:

Having received the enclosed, confidential information, please understand that you have been asked to serve in an important fiduciary role.

The instructions within this document are intended for your use to assist you in locating legal documentation and following certain instructions noted herein.

Special legal instructions have been delivered through binding instruments of signed estate planning documents carefully prepared to designate your loved one’s personal wishes.

Please call RCB Law Offices of Robert C. Beck, Ltd. for assistance in understanding your fiduciary responsibilities and for assistance in making sure that the specific legal instructions of your loved one are properly executed.

Robert C. Beck, Attorney at Law (630) 933-9201