

# Essential Checklist for Your Attorney

## You and Your Family

	You	Spouse
Name		
DOB		
SSN		

Children	DOB	SSN
Child 1		
Child 2		
Child 3		
Child 4		

## Your Trustee

	Name	Relationship
Trustee		
Cotrustee (if any)		
First successor trustee		
Second successor trustee		
Third successor trustee		

## Your Property and How It It Currently Titled

	Current Title
Residence 1	
Residence 2 (if applicable)	
Other Real Estate	
Mortgages	
Bank Account 1	
Bank Account 2 (if applicable)	
Brokerage Account 1	
Brokerage Account 2 (if applicable)	
Individual Stock Certificates	
Individual Bonds	
Vehicle 1	
Vehicle 2 (if applicable)	
Vehicle 3 (if applicable)	
Boats, campers, etc	
Other - untitled assets	
Untitled Asset 1	
Untitled Asset 2	

## Your Beneficiaries

	Primary	Contingent
Life Insurance 1		
Life Insurance 2 (if applicable)		
IRA 1		
IRA 2 (if applicable)		
Retirement Plan 1		
Retirement Plan 2 (if applicable)		
Annuity 1		
Annuity 2 (if applicable)		