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Will and Trust Information Checklist

Husband Name: _____

Date: _____

Wife Name: _____

Children:

<u>Name</u>	<u>Age/Date of Birth</u>
_____	_____
_____	_____
_____	_____
_____	_____

Assets

Real Property: (Address, City, State, Zip)

1. _____
2. _____
3. _____

Example: *1234 Anywhere Lane, Any Town, State, 12345*

Please Include Timeshares and all other Real Property other than residence.

Personal Property:(Such as Investment Accounts and Bank Accounts)

1. _____
2. _____
3. _____

Example: *Fidelity Mutual Funds Account Number# FI-1234*

Please Bring with you the Following:

1. Copies of Deeds
3. Copies of Investment Statements