



THE ESTATE INVENTORY

IMPORTANT DOCUMENTS	IMPORTANT PEOPLE
<p style="text-align: center;">Do you have any of these documents?</p> <p><input type="checkbox"/> Last Will and Testament</p> <p><input type="checkbox"/> Revocable Trust</p> <p><input type="checkbox"/> Other Trust for Investments or Life Insurance</p> <p><input type="checkbox"/> Marital Property Agreement</p> <p><input type="checkbox"/> Prenuptial Agreement</p> <p><input type="checkbox"/> Payable on Death Designations from a Bank</p> <p><input type="checkbox"/> Beneficiary Designations from a Life Insurance Company, Annuity, IRA or Retirement Account</p> <p>Collect these documents and bring them to your appointment.</p>	<p>List the names, addresses and phone numbers for the following people:</p> <p><input type="checkbox"/> Executor, Trustee or Personal Representative named in the Will and/or Revocable Trust</p> <p><input type="checkbox"/> Surviving Spouse</p> <p><input type="checkbox"/> Children*</p> <p><input type="checkbox"/> Other people specifically named in the Last Will and Testament or Revocable Trust</p> <p>* If any children are deceased, list their names and the names, addresses and phone numbers of the deceased child's surviving children.</p>

FITZGERALD LAW OFFICE

List each asset owned. If there is a payable on death ("P.O.D.") designation or other arrangement naming a post-death beneficiary for an asset, include the name of the beneficiary in the "OWNER" column.

	<u>ASSET</u>	<u>OWNER</u>	<u>VALUE</u>
1.			
2.			
3.			
4.			
5.			
6.			
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