Shatterproof
Stronger than addiction

Estate Planning Workbook

Donor Preparation Guide for Estate Planning Meetings

shatterproof.org

Complete this free workbook to help prepare for estate planning conversations with our team, family members, or your attorney.

PERSONAL INFORMATION

Date this form was completed: ______________________________

Legal Name ______________________________
First Middle Last

Spouse/Domestic Partner ______________________________
First Middle Last

Permanent Address ______________________________

Street ______________________________

City ______________________________
State Zip

Date of Birth (Self) ______________ (Spouse/Domestic Partner) ______________

Telephone (Preferred) ______________ (Secondary) ______________

Email ______________

Soc. Sec. # (Self) ______________ (Spouse/Domestic Partner) ______________

Email ______________

Birth Certificate Location ______________ Copy Location ______________

Date of Marriage/Domestic Partner Registration ______________________________

Place of Marriage/Domestic Partner Registration ______________________________

If divorced or separated:
Include names and dates of previous marriages, whether the marriage ended by divorce or legal separation, and the location of pertinent legal papers and documents.

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If spouse/domestic partner is deceased, details:

Name: ____

Date of Marriage Date of Death

Location of will/codicils: ____

Location of trust/amendments to trust: ____

Location of federal estate tax return: ____

Location of gift tax returns: ____

There ☐ is ☐ is not a prenuptial agreement.

Location of prenuptial agreement ____

____

____

U.S. Citizen? ☐ Yes ☐ No

If not a U.S. citizen by birth, indicate date and place of naturalization.

Naturalization Date ____________________ Place ____________________

Naturalization Papers Located ____

Spouse/Partner: U.S. Citizen? ☐ Yes ☐ No

If not a U.S. citizen by birth, indicate date and place of naturalization.

Naturalization Date ____________________ Place ____________________

Naturalization Papers Located ____

Other Citizenship ____

PROPERTY

PERSONAL PROPERTY

Include personal effects, automobile(s), jewelry, household effects, furniture, artifacts, etc.

Item	Location	Approximate Value If Sold Today
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$

CASH (CHECKING, SAVINGS, AND MONEY MARKET)

Bank and Address	Title on Account	Account #	Amount

CERTIFICATES OF DEPOSIT

Bank and Address	Certificate #	Maturity Date	Title on Account	Amount
				$
				$
				$
				$
				$
				$
				$

STOCKS, BONDS, MUTUAL FUNDS HELD IN BROKERAGE ACCOUNTS

				$
				$
				$
				$
				$
				$

SECURITIES NOT HELD IN A BROKERAGE ACCOUNT

Type of Security	Title on Account	Serial #	Date of Purchase	Amount
				$
				$
				$
				$
				$
				$

LOCATION OF ANY STOCK CERTIFICATES, BONDS, OPTIONS, ETC., THAT ARE NOT HELD IN BROKERAGE ACCOUNTS

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MONEY INVESTED IN MORTGAGES, PERSONAL LOANS, TRUST DEEDS (MONEY OWED TO YOU)

With Whom & Address	Cost When Acquired	Title on Account	Current Value
			$
			$
			$
			$
			$
			$
			$
			$
			$

REAL ESTATE OWNED

Type of Property & Location	Cost When Acquired	Title on Account	Current Value	Debt/Lender
				$
				$
				$
				$
				$
				$
				$
				$
				$
				$
				$

OTHER ASSETS

Type of Property	Title on Account	Cost Basis	Date of Investment	Current Value
				$
				$
				$
				$
				$
				$

INSURANCE

LIFE INSURANCE YOU OWN (ON YOUR OWN LIFE)

Company	Type of Policy & Policy Number	Beneficiary	Amount
			$
			$
			$
			$
			$
			$

COMPANIES AND/OR ORGANIZATIONS THAT OWN POLICIES ON YOUR LIFE

Company	Type of Policy & Policy Number	Beneficiary	Amount
			$
			$
			$

INSURANCE OWNED BY YOU ON THE LIVES OF OTHERS

Company	Type of Policy & Policy Number	Insured	Beneficiary	Amount
				$
				$
				$
				$

LOCATION OF LIFE INSURANCE POLICIES

____

OTHER INSURANCE

Company	Type of Policy & Policy Number	Policy #	Coverage
			$
			$
			$

INDIVIDUAL RETIREMENT ACCOUNTS, PENSIONS, RETIREMENT OR DEATH BENEFIT PLANS

Fund Name & Company	Account #	Beneficiary	Telephone	Amount
				$
				$
				$
				$
			Total	$

LOCATION OF ANY EMPLOYMENT CONTRACTS OR BUSINESS AGREEMENTS RELATING TO INTERESTS IN CORPORATIONS, PARTNERSHIPS, SOLE PROPRIETORSHIPS, ETC.

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WHAT YOU OWE

LOANS

To Whom Debt Or Mortgage Is Owed	Address	Payment Date	Current Amount Owed
			$
			$
			$
	Total Approximate Indebtedness		$

CHARITABLE PLANNED GIVING PARTNER:
Shatterproof, Attn: Advancement Team
101 Merritt 7 Corporate Park, 1st Floor
Norwalk, CT 06851
(800) 597-2557

PLAN YOUR ESTATE DISTRIBUTION
You do not need to describe every item of your personal or real property in your will. However, if there is some specific asset that you want to go to a certain individual in your living will or trust, list it below. You may include individuals, other than nearest relatives, whom you wish to include in your estate planning. Also, if you wish to leave a specific sum of money to a person or charity, state the amount and the name.

Person	Address	Relationship	Item, Property, or Sum of Money	Locations of Asset

CHARITIES

Charity Name	Address	Telephone	Amount
			$
			$
			$
			$
			$
			$

After the specific bequests (if any), the simplest way to divide the residue of your estate is by percentages. Name the person or charity you wish to remember, and then state what percentage of the total remaining amount of your estate each is to receive.

____ ______________________%

____ ______________________%

____ ______________________%

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