

ESTATE PLANNING INFORMATION

Cannizzaro, Bridges, Jilisky & Streng, LLC

USING THIS ORGANIZER WILL ASSIST US IN DESIGNING AN ESTATE PLAN THAT MEETS YOUR GOALS.
ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

PERSONAL INFORMATION

Your Full Legal Name _____ Driver's License # _____

Names used when signing documents _____
(other names used, past and present)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Parents - Mother _____ - If Deceased, Date of Death _____

- Father _____ - If Deceased, Date of Death _____

Siblings _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ County of Residence _____ Mobile/Cell Telephone _____

Employer _____ Position _____

Business Address _____ City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my E-mail address.

Married: Date of Marriage _____ Divorced Widowed Single

Spouse's Legal Name _____ Driver's License # _____

Names used when signing documents _____
(other names used, past and present)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Parents - Mother _____ - If Deceased, Date of Death _____

- Father _____ - If Deceased, Date of Death _____

Siblings _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ County of Residence _____ Business Telephone _____

Employer _____ Position _____

Business Address _____ City _____ State _____ Zip _____

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

FAMILY INFORMATION

Information about your children	Spouse's name	Child's children's (your grandchildren) names, ages today
Please also indicate children from previous marriage, divorces, mental or physical handicaps, stepchildren, adoptions, etc. (Use full legal name. Use "JT" if both spouses are the parents, "H" if husband is the parent, "W" if wife is the parent, "S" if a single parent.)		

Name	Spouse's Name	1
Birth date and age		2
Social Security Number		3
Phone		4
Address		5
		6
Comments (job, education, etc.)		

Name	Spouse's Name	1
Birth date and age		2
Social Security Number		3
Phone		4
Address		5
		6
Comments (job, education, etc.)		

Name	Spouse's Name	1
Birth date and age		2
Social Security Number		3
Phone		4
Address		5
		6
Comments (job, education, etc.)		

Name	Spouse's Name	1
Birth date and age		2
Social Security Number		3
Phone		4
Address		5
		6
Comments (job, education, etc.)		

Name	Spouse's Name	1
Birth date and age		2
Social Security Number		3
Phone		4
Address		5
		6
Comments (job, education, etc.)		

If you have great grandchildren, please give names, ages, and parents of each on reverse side.

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

IMPORTANT FAMILY QUESTIONS

(Please check "Yes" or "No" for your answer)	Yes	No
Are you (or your spouse) receiving social security, disability, or other governmental benefits? <i>Describe</i> _____		
Do you have long-term care insurance? <i>Describe below.</i>		
Are you (or your spouse) making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
If married have you and your spouse signed a pre- or post-marriage contract? <i>Please furnish a copy</i>		
Have you (or your spouse) been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you (or your spouse) ever filed federal gift tax returns (i.e. made any gifts exceeding the federal gift tax annual exclusion per year per person (The amount in 2008 is \$12,000, but has been lower in prior years)? <i>If so, please furnish a copy</i>		
Have (you or your spouse) completed previous wills, trusts, or other estate planning documents? <i>Please furnish copies of these documents</i>		
Are there any charitable organizations you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
If married, have you lived in any of the following states while married to each other? <i>Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin</i>		
Are you (or your spouse) currently the beneficiary of anyone else's trust, or expect to receive an inheritance from someone? <i>If so, please explain below.</i>		
Do any of your children have special educational, medical, or physical needs? <i>If so, please explain below.</i>		
Do any of your children receive governmental support or benefits? <i>If so, please explain below.</i>		
Do you provide primary or other major financial support to adult children or others? <i>If so, please explain below.</i>		
Do you own an interest in any S corporations?		
Do you have adopted children or stepchildren? <i>If so, please list under Family Info above</i>		

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

ADDITIONAL RELEVANT INFORMATION

ADVISORS

Name	Address	Telephone
Attorney _____	_____	_____
Accountant _____	_____	_____
Financial Advisor _____	_____	_____
Life Insurance Agent _____	_____	_____
Property Insurance Agent _____	_____	_____

LOCATION OF IMPORTANT PAPERS

Will: _____	Military Service Discharge Papers: _____
Trust: _____	Birth Certificate: _____
Insurance Papers: _____	Marriage License: _____
Deeds: _____	Secret Hiding Locations: _____
Tax Returns: _____	Combination to any Safe: _____
Safe Deposit Box: _____	Other: _____

FUNERAL ARRANGEMENTS

Name	Address	Telephone
Preferred Funeral Director _____	_____	_____
Minister - _____, or the minister of the _____ Church at that time		
Church _____		
Other information _____		
Location of Burial Plot _____		
Outline of items to be included in obituary:		

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

PROPERTY INFORMATION

INSTRUCTIONS FOR COMPLETING THE *PROPERTY INFORMATION* CHECKLIST

General Headings

This *Property Information* checklist is designed to help you list all the property you own and **an estimate** of what it is worth. If you do not own property under a particular heading, just leave that section blank. Under certain headings you may own more property than can be listed on this checklist. If so, use **extra sheets** of paper to list your additional property.

Type

Immediately after the heading for each kind of property is a brief explanation of what property you should list under that heading.

“Owner” of Property

How you own your property is **extremely important** for purposes of properly designing and implementing your estate plan. For each property please indicate how the property is titled. When doing so, please use the following abbreviations:

Owner of Property	Use
If married, Husband’s name alone, with no other person	H
If married, Wife’s name alone, with no other person	W
If married, Joint Tenancy with spouse	JTS
Joint Tenancy with someone other than a spouse, i.e. a child, parent, etc.	JTO
If you cannot determine how the property is owned	?

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

BANK & SAVINGS ACCOUNTS

TYPE: Checking Account "CA", Savings Account "SA", Certificates of Deposit "CD", Money Market "MM", including cash (indicate type below). *Do not include IRA's or 401(k)'s here*

EVIDENCE OF TITLE: The signature card or the document you signed to set up the account.

Name of Institution	Type	Acct. Number	Owner	Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Total</i>				_____

Note: If Account is in your name (or your spouse's name) for the benefit of a minor, please specify and give minor's name.

INVESTMENT ACCOUNTS

TYPE: Money market "MM," investment "I," cash management "CM" or other account that is in a street name (indicate type below)

EVIDENCE OF TITLE: The document you signed to set up the account, account statement.

Name of Brokerage Firm	Type	Acct. Number	Owner	Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Total</i>				_____

STOCKS

TYPE: Stocks in publicly owned corporations which is stock traded on an exchange or over the counter. (Stock owned in family or nonpublicly traded companies should be listed under "Corporate Business and Professional Interests." Stocks held in a street name or investment account should be listed under "Investment Accounts").

EVIDENCE OF TITLE: Stock certificate

Company	Owner	Number of Shares	Fair Market Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<i>Total</i>			_____

Cannizzaro, Bridges, Jilisky & Stren, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

BONDS

TYPE: U.S. Savings Bonds, corporate, municipal, etc., (indicate type below)

EVIDENCE OF TITLE: Bond instrument

Type	Owner	Face Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
		<i>Total</i> _____

RETIREMENT PLANS

TYPE: Pension (P), Profit Sharing (PS), H.R. 10, IRA, SEP, 401(K). **ADDITIONAL INFORMATION:** Describe the type of plan, the plan name, the current value of the plan, and any other pertinent information.

EVIDENCE OF TITLE: Summary plan description, documents you signed to set up the plan, account statement, beneficiary designation.

Type of Plan	Company	Owner	Percent Vested	Fair Market Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
				<i>Total</i> _____

MONEY OWED TO YOU

TYPE: Mortgages or promissory notes payable to you, or other moneys owed to you.

Name of Debtor	Date of Note	Maturity Date	Owed to	Current Balance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
				<i>Total</i> _____

ANTICIPATED INHERITANCE, GIFT, OR LAWSUIT JUDGMENT

TYPE: Gifts or inheritances that you expect to receive at some time in the future; or moneys that you anticipate receiving through a judgment in a lawsuit. **Describe in appropriate detail.**

Description _____
Total estimated value _____

Cannizzaro, Bridges, Jillisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

LIFE INSURANCE POLICES AND ANNUITIES

TYPE: Term, whole life, split dollar, group life, annuity (indicate type below. If a corporation or company owns the policy or pays the premium on the policy, write "Corporation").

EVIDENCE OF TITLE: The policy itself, including all endorsements, and amendments, and the original application you signed.

Company _____
Policy Number _____ Type _____
Insured _____
Primary beneficiary _____
Secondary beneficiary _____
Owner _____ Who pays premium _____
Face Amount _____ Cash Value _____
Amount of loans on policy _____

Company _____
Policy Number _____ Type _____
Insured _____
Primary beneficiary _____
Secondary beneficiary _____
Owner _____ Who pays premium _____
Face Amount _____ Cash Value _____
Amount of loans on policy _____

Company _____
Policy Number _____ Type _____
Insured _____
Primary beneficiary _____
Secondary beneficiary _____
Owner _____ Who pays premium _____
Face Amount _____ Cash Value _____
Amount of loans on policy _____

Company _____
Policy Number _____ Type _____
Insured _____
Primary beneficiary _____
Secondary beneficiary _____
Owner _____ Who pays premium _____
Face Amount _____ Cash Value _____
Amount of loans on policy _____

Company _____
Policy Number _____ Type _____
Insured _____
Primary beneficiary _____
Secondary beneficiary _____
Owner _____ Who pays premium _____
Face Amount _____ Cash Value _____
Amount of loans on policy _____

Cannizzaro, Bridges, Jilisky & Strenig, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

Company _____ Page 10
 Policy Number _____ Type _____
 Insured _____
 Primary beneficiary _____
 Secondary beneficiary _____
 Owner _____ Who pays premium _____
 Face Amount _____ Cash Value _____
 Amount of loans on policy _____

Company _____
 Policy Number _____ Type _____
 Insured _____
 Primary beneficiary _____
 Secondary beneficiary _____
 Owner _____ Who pays premium _____
 Face Amount _____ Cash Value _____
 Amount of loans on policy _____

OTHER ASSETS

TYPE: Other property is any property that you have that does not fit into any listed category.

Type	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
<i>Total</i>	_____	_____

PROJECTED RETIREMENT INCOME

Source:

Estimated Annual Income:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com

SUMMARY OF VALUES

Amount

ASSETS		Husband	Wife	Joint*	Total Value
Real Property					
Personal Effects					
Automobiles, Planes, Boats & Rvs					
Farm and Ranch Assets					
Partnership Interests					
Corporate Business & Professional Interests					
Sole Proprietorship Business & Professional Interests					
Bank & Savings Accounts					
Investment Accounts					
Stocks					
Bonds					
Retirement Plans					
Money Owed to You					
Anticipated Inheritance, Gift, or Lawsuit Judgment					
Life Insurance & Annuities					
Other Assets					
Total Assets:					
LIABILITIES					
Loans payable					
Accounts payable					
Real estate mortgage					
Loans against life insurance					
Unpaid taxes					
Other obligations					
Total liabilities:					
NET ESTATE					

** Joint Property values enter joint column.*

Cannizzaro, Bridges, Jilisky & Streng, LLC

◆ 302 South Main Street, Marysville, Ohio 43040 ◆ www.cfbjs.com
 Phone: (937) 644-9125 ◆ Fax: (937) 644-0754 ◆ kcutler@cfbjs.com