Financial Checklist for Estate Planning

Bank and Credit Union Accounts

Current statement for all accounts (please list which branch you do business with)

Life Insurance

Statements showing insurance company agent and address, owner, and policy number

Retirement Funds

Statement showing custodian of account, company address, account number, and owner

Investments

Copy of statement showing company, company address, account number and owner

Original company stock certificates (must be submitted to company)

Insurance Company for Homeowners and Automobile

Statement showing Insurance company name, agent, agent's address, and policy number

Bonds

Original bonds

Business Interests

Partnership agreement
Corporate Book

Real Estate

Most recent tax bill
Current Deed

If you have any questions, please call Lisah Vander Heiden at (920) 993-0990 or (800) 794-5548 Fax: (920) 560-5540 or email lisah@hooperlawoffice.com

Please keep in mind current statements are necessary for accurate estate planning.