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## ESTATE PLANNING WORKSHEET

The information requested in this worksheet may seem like none of our business, but it is very important that an estate planner understands your present situation and your wishes for the future. Information provided is held in complete confidence, and is used for the sole purpose of analyzing estate planning needs and designing estate planning documents.

Please complete this worksheet and submit it to us for review. ***VERY IMPORTANT:*** *If you are married and all information on this worksheet is identical for you and your spouse, complete only one worksheet. If information for each spouse/partner differs, make a copy of this worksheet so each spouse/partner has a separate one. If this is not a first marriage for both you and your spouse, then you each must complete separate worksheets.*

Once we have received and reviewed your responses and any submitted supporting documents, we will contact you to schedule an appointment. In doing this, more information and value will be given to you during the consultation.

During the appointment, we will determine your specific estate planning needs and goals. The potential cost of probate and tax which would occur with your current plan will be analyzed, and methods of reducing costs and accomplishing goals will be discussed. An exact quote on fees for most estate planning will be provided before you decide to authorize completion of your estate plan.

We look forward to working with you on your estate planning!





**CHILDREN OR OTHER BENEFICIARIES**

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Name	Address	Age	Date of Birth	Relationship

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**ABOUT YOUR CONCERNS:**

What is your primary motivation for considering estate planning? *(Select one or more)*

- Avoid probate court proceedings if incapacitated or deceased
- Provide for and protect a spouse/partner
- Provide for and protect minor children
- Make large gifts to children or others during lifetime
- Provide for charities at death
- Business or farm planning
- Federal Estate and/or Illinois Estate Tax Planning
- Other: \_\_\_\_\_

For most clients, the estate planning process typically takes about 2-3 months to complete once all information has been gathered and all decisions have been made. Is there a critical deadline for completion, such as an upcoming surgery, etc.? \_\_\_\_\_

Please list any other concerns that you want to discuss: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ABOUT YOUR PLANNING:**

	<i>Yourself</i>	<i>Spouse/Partner</i>
Are you (or a spouse/partner) receiving Social Security, disability, or other government benefits?	Y/N ____	Y/N ____
Were there any previous marriages?	Y/N ____	Y/N ____

*Yourself*                      *Spouse/Partner*

If so, do you have any outstanding financial obligations under any divorce decree?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

If yes, please specify and provide copies of divorce decree or property settlement orders. \_\_\_\_\_  
\_\_\_\_\_

If your parents (or a spouse's/partner's parents) have disclosed their estate plan to you, please describe:  
\_\_\_\_\_

Are you (or a spouse/partner) aware that another person has given you a "power of appointment" (not the same thing as a power of attorney) in his or her estate planning documents? If so, please provide copies of documents granting such power.                      Y/N \_\_\_\_                      Y/N \_\_\_\_

Have you (or a spouse/partner) ever filed gift tax returns? If so, please provide copies of all gift tax returns.                      Y/N \_\_\_\_                      Y/N \_\_\_\_

Do you own a long-term care (nursing home) insurance policy?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

Do you have a safe deposit box?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

If so, where is it and whose name(s) is on the box? \_\_\_\_\_  
\_\_\_\_\_

Do you own a farm or business?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

If yes, do you have a buy/sell agreement for the business (provide us with copy)?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

If yes, do any of your children work in the business with you?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

If yes, does the child working in the business have an ownership interest in the business?                      Y/N \_\_\_\_                      Y/N \_\_\_\_

In general, where would you like your assets to go after any specific gifts are distributed after your death (don't worry about tax planning or other considerations in answering this question as we'll discuss those details later if needed)?

- \_\_\_\_\_ All to spouse, then equally between children, and if a child didn't survive, the deceased child's children would take the share of the deceased child.
- \_\_\_\_\_ All to spouse, then equally between surviving children.
- \_\_\_\_\_ All to spouse, then \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ As follows: \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_

**ABOUT YOUR INCOME, ASSETS AND LIABILITIES:**

**NET WORTH:** If you added the value of all property owned by yourself (and your spouse if married) including real estate, personal property, bank accounts, stock, bonds, IRAs, and anything else you own ***less outstanding liabilities and excluding death benefits on life insurance***, what is the approximate total value of your estate (and your spouse if married)? \$ \_\_\_\_\_

What is the value of death on life insurance?                      Insuring                      Insuring  
 Yourself \_\_\_\_\_                      Spouse \_\_\_\_\_

**INCOME/ASSET/LIABILITY INFORMATION**

Please list your income/asset/liability information in the appropriate category below.

<b><i>INCOME</i></b>	Yourself	Joint	Spouse/Partner
Monthly earned from labor			
Monthly Social Security			
Monthly Pension			
Other monthly			

<b><i>REAL ESTATE</i></b>	How titled (e.g., sole, joint w/spouse)	Description (e.g, residential, commercial)	Current Value
Personal Residence:			
Other:			

<b><i>LIQUID ASSETS</i></b>	Who Owns	Where Held and Account #	Current Value
Cash on hand			
Checking accounts			
Savings accounts			
Money market accounts			
Custodial accounts for minors			
Certificates of deposit			
Stocks, bonds, <i>taxable brokerage accounts</i>			
Unlisted securities			

**RETIREMENT ACCOUNTS:**

<b>Type</b> ( <i>IRA, 401(k), etc.</i> ):	<b>Company</b>	<b>Owner</b>	<b>Beneficiary(ies)</b>	<b>Current Value</b>
			1. 2.	

<b>Annuities</b>	<b>Company</b>	<b>Owner</b>	<b>Beneficiary(ies)</b>	<b>Current Value</b>
Tax-deferred? Y/N ____			1. 2.	
Tax-deferred? Y/N ____				

<b>Pension or Profit sharing?</b>	<b>Company</b>	<b>Owner</b>	<b>Beneficiaries</b>	<b>Current Value</b>



**LIFE INSURANCE:**

Company	Owner	Beneficiary(ies)	Cash Value	Death Benefit
		1. 2.		

**OTHER ASSETS:**

Business name	Type (e.g., sole proprietorship, partnership, LLC, corporation, Sub-S corp.)	Title in which held ( <i>include % ownership</i> )	Description	Current Value

Notes & loans receivable	Owed by	Owed to	Amount owed

Personal property (cars, boats, jewelry, etc.)	Description	Owed by	Current value

Any other assets not listed above? (e.g., crypto currencies, beneficial interest in trust or estate, inheritance received, copyrights, trademarks, patents or other intangible rights)

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**LIABILITIES** (e.g., home mortgage, home equity loans, auto loans):

Description	Name Loan Taken In: (Yourself, Spouse, Joint, Other)	Amount Owed
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**ABOUT YOUR DECISION MAKERS:**

The following will ask for the various people who will be named in your estate plan. We will categorize these people into appropriate roles during our meeting. For now, just list any people who might be relevant (for you and a spouse/partner).

Who are the people who would help make financial decisions if you were to become incapacitated or deceased?

Name	Relationship

Who are the people who would help make medical decisions for you if you were to become incapacitated?

Name	Relationship

