

FAMILY ESTATE RECORD
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FAMILY INFORMATION

Husband's Full Name _____ Phone # _____ Date of Birth _____
 Wife's Full Name _____ Phone # _____ Date of Birth _____
 Address _____
 Phone Numbers _____
 Email Addresses _____

CHILDREN (if married give married names)

1. _____ Birthdate _____
 Address _____
 Phone # _____
 2. _____ Birthdate _____
 Address _____
 Phone # _____
 3. _____ Birthdate _____
 Address _____
 Phone # _____
 4. _____ Birthdate _____
 Address _____
 Phone # _____
 5. _____ Birthdate _____
 Address _____
 Phone # _____

GRANDCHILDREN (Name and age)

CHECKLIST OF DOCUMENTS AND OTHER IMPORTANT INFORMATION

| | Location |
|------------------------------------|----------|
| Abstracts and Title Policies | _____ |
| Birth Certificates | _____ |
| Marriage Certificates | _____ |
| Armed Forces Papers | _____ |
| Income Tax Returns | _____ |
| Life Insurance Policies | _____ |
| General Insurance Policies | _____ |
| Savings Account Books | _____ |
| Safety Deposit Box | _____ |
| Safety Deposit Box Key | _____ |
| Stocks and Bonds | _____ |
| Wills, husband and wife | _____ |
| Cemetery Deed | _____ |
| Automobile and Truck Titles | _____ |
| Household Goods Inventory | _____ |

If you are a trustee or guardian, describe property held and person involved: _____

ASSETS

SCHEDULE A - LIQUID FUNDS

1. Checking Accounts or Money Market Funds

| <i>Name of Institution</i> | | |
|----------------------------|------------------------|--------------------|
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |

2. Savings, Certificates of Deposit, and similar interest bearing investments

| <i>Name of Institution</i> | | |
|----------------------------|------------------------|--------------------|
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |
| _____ | In Whose Name(s) _____ | Ave. Amt. \$ _____ |

TOTAL (carry to page 8) \$ _____

SCHEDULE B - U.S. SAVINGS BONDS, TREASURE BILLS, or AGENCY BONDS

| <i>Type</i> | <i>Maturity Date</i> | <i>Owner(s)*</i> | <i>Maturity Value</i> |
|-------------|----------------------|------------------|-----------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

TOTAL (carry to page 8) \$ _____

SCHEDULE C - CORPORATE or MUNICIPAL BONDS or BOND FUNDS

| <i>Face Amount</i> | <i>Issuer</i> | <i>Owner(s)*</i> | <i>Amount Paid</i> |
|--------------------|---------------|------------------|--------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

TOTAL (carry to page 8) \$ _____

(Names of owners should be taken directly from the face of the bond(s). Show such language as “and/or” to indicate how title is held.)

SCHEDULE D - STOCKS or STOCK MUTUAL FUNDS

| # of Shares | Company | Common or Preferred | Owner(s)* | Current Fair Market Value |
|--------------------------------|---------|---------------------|-----------|---------------------------|
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | _____ | \$ _____ |
| TOTAL (carry to page 8) | | | | \$ _____ |

SCHEDULE E - NOTES AND MORTGAGES HELD FOR LOANS YOU MADE TO OTHERS

| Name of person in debt to you | Name of person the note is made out to* | Date Due | Amount |
|--------------------------------|---|----------|----------|
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| TOTAL (carry to page 8) | | | \$ _____ |

SCHEDULE F - AUTOMOBILES, TRUCKS, BOATS or RECREATIONAL VEHICLES

1. Make & Year _____ Registered owner(s) _____

2. Make & Year _____ Registered owner(s) _____

3. Make & Year _____ Registered owner(s) _____

TOTAL VALUE (carry to page 8) \$ _____

SCHEDULE G - HOUSEHOLD GOOD, PERSONAL EFFECTS and COLLECTIONS

Brief Description _____

TOTAL VALUE (carry to page 8) \$ _____

*Names of owners should be taken from the face of the stocks and notes. Show such language as “and/or” to indicate how title is held.

SCHEDULE H - URBAN AND INVESTMENT REAL ESTATE

Tract 1. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: Joint Tenancy (right of survivorship) Tenancy in Common

Date of acquisition _____ How acquired: Gift Purchase Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 2. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: Joint Tenancy (right of survivorship) Tenancy in Common

Date of acquisition _____ How acquired: Gift Purchase Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

TOTAL VALUE OF ALL TRACTS (carry to page 8) \$ _____

FARM SCHEDULE (if applicable)

SCHEDULE I - FARM MACHINERY and EQUIPMENT

Brief Description _____

TOTAL VALUE (carry to page 8) \$ _____

SCHEDULE J - LIVESTOCK

Kind and Number _____

TOTAL VALUE (carry to page 8) \$ _____

SCHEDULE K - GRAIN INVENTORY

Kind and Amount _____

TOTAL VALUE (carry to page 8) \$ _____

SCHEDULE L - FARM REAL ESTATE

Tract 1. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 2. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 3. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 4. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 5. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

Tract 6. Legal Description: _____

_____ County _____ State _____

Owned in name(s) of _____

If more than one owner, please indicate how title is held: [] Joint Tenancy (right of survivorship) [] Tenancy in Common

Date of acquisition _____ How acquired: [] Gift [] Purchase [] Inheritance

Price paid or value when acquired \$ _____ PRESENT VALUE \$ _____

TOTAL VALUE OF ALL TRACTS (carry to page 8) \$ _____

LIABILITIES

SCHEDULE M - OPERATING BILLS AND ACCOUNTS PAYABLE

| | <i>Description</i> | <i>Amount</i> |
|----|--------------------|---------------|
| 1. | _____ | \$ _____ |
| 2. | _____ | \$ _____ |
| 3. | _____ | \$ _____ |
| 4. | _____ | \$ _____ |
| 5. | _____ | \$ _____ |

TOTAL AMOUNT (carry to page 8) \$ _____

SCHEDULE N - SECURED DEBT ON MACHINERY, GRAIN AND OTHER PERSONAL PROPERTY

| | <i>Property Secured</i> | <i>Name of Creditor or Lender</i> | <i>Due Date</i> | <i>Amount</i> |
|----|-------------------------|-----------------------------------|-----------------|---------------|
| 1. | _____ | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | _____ | \$ _____ |

TOTAL AMOUNT (carry to page 8) \$ _____

SCHEDULE O - REAL ESTATE MORTGAGES AND AMOUNTS OWNED ON REAL ESTATE PURCHASE CONTRACTS

| | <i>Property</i> | <i>Name of Creditor or Lender</i> | <i>Due Date</i> | <i>Amount</i> |
|----|-----------------|-----------------------------------|-----------------|---------------|
| 1. | _____ | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | _____ | \$ _____ |

TOTAL AMOUNT (carry to page 8) \$ _____

SCHEDULE P - UNSECURED NOTES

| | <i>Name of Creditor or Lender</i> | <i>Due Date</i> | <i>Amount</i> |
|----|-----------------------------------|-----------------|---------------|
| 1. | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | \$ _____ |

TOTAL AMOUNT (carry to page 8) \$ _____

INSURANCE INFORMATION

HUSBAND'S LIFE INSURANCE

| | Company | Policy Number | Kind of Policy | Beneficiary | Owner (if not insured) | Amount |
|----|---------|---------------|----------------|-------------|------------------------|-----------------------|
| 1. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| | | | | | | TOTAL \$ _____ |

WIFE'S LIFE INSURANCE

| | Company | Policy Number | Kind of Policy | Beneficiary | Owner (if not insured) | Amount |
|----|---------|---------------|----------------|-------------|------------------------|-----------------------|
| 1. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| | | | | | | TOTAL \$ _____ |

CHILDREN'S LIFE INSURANCE (in which parents have interest, if any)

| | Company | Policy Number | Kind of Policy | Beneficiary | Owner (if not insured) | Amount |
|----|---------|---------------|----------------|-------------|------------------------|-----------------------|
| 1. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 2. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 3. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 4. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| 5. | _____ | _____ | _____ | _____ | _____ | \$ _____ |
| | | | | | | TOTAL \$ _____ |

HEALTH INSURANCE

| | | | |
|----|---------------|----------------|----------|
| 1. | Company _____ | Coverage _____ | \$ _____ |
| 2. | Company _____ | Coverage _____ | \$ _____ |

CASUALTY INSURANCE (on buildings, household goods, machinery & vehicles)

| | | | |
|----|---------------|----------------|----------|
| 1. | Company _____ | Coverage _____ | \$ _____ |
| 2. | Company _____ | Coverage _____ | \$ _____ |
| 3. | Company _____ | Coverage _____ | \$ _____ |
| 4. | Company _____ | Coverage _____ | \$ _____ |

SUMMARY OF ASSETS AND LIABILITIES
(excluding life insurance)

| | Schedule | Total (Joint) | Total (Husband) | Total (Wife) | Total (Other) |
|--|----------|------------------|--------------------|-----------------|------------------|
| ASSETS | | | | | |
| Liquid Accounts | A | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| U.S. Funds | B | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Bonds | C | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Stocks | D | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Notes & Mortgages held for loans made to others | E | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Licensed Vehicles | F | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Household Goods | G | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Urban Real Estate | H | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Farm Machinery | I | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Livestock | J | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Grain Inventory | K | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Farm Real Estate | L | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| TOTAL ASSETS | | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| LIABILITIES | | | | | |
| Bills & Accounts Payable | M | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Scheduled Debt on Machinery, Grain, and other Personal Property | N | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Real Estate Mortgages & Amounts Owed on Real Estate Purchase Contracts | O | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| Unsecured Notes | P | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| TOTAL LIABILITIES | | \$ _____ | \$ _____ | \$ _____ | \$ _____ |
| NET WORTH | | \$ _____ | \$ _____ | \$ _____ | \$ _____ |