**Meub Gallivan & Larson – Flat Fee Estate Planning Worksheet**

Client Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Real Estate**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name(s) on Deed  | Primary Resid.? | Location | Fair MarketValue | Total Mortgage Amount and Bank Name |
|  |  |  |  |  |
|  |  |  |  |  |

**Vehicles**

|  |  |  |  |
| --- | --- | --- | --- |
| Name(s) on Title  | Year, Make, Model  | FMV | Total loan amount and Bank Name |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Bank Accounts**

|  |  |  |  |
| --- | --- | --- | --- |
| Name(s) on Account (Owner) | Bank  | Value | Beneficiary or POD |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Retirement Accounts**

|  |  |  |  |
| --- | --- | --- | --- |
| Name(s) on Account (Owner) | Bank /Institution | Value | Beneficiary or POD |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

 **Investment or Other Accounts**

|  |  |  |  |
| --- | --- | --- | --- |
| Name(s) on Account (Owner) | Bank /Institution | Value | Beneficiary or POD |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Life Insurance Policies**

|  |  |  |  |
| --- | --- | --- | --- |
| Named Insured | Beneficiary | Value | Insurance Company Name  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Other Assets:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_