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

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

**Real Estate**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name(s) on Deed | Primary Resid.? | Location | Fair Market  Value | 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:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_