Will and Asset Planner Sheet (Blank)

# 1. Personal Information

|  |  |
| --- | --- |
| Full Name |  |
| Date of Birth |  |
| Social Security Number |  |
| Address |  |
| Phone Number |  |
| Email |  |
| Marital Status |  |
| Spouse's Name |  |
| Children’s Names and Birth Dates |  |
| Executor Name and Contact Information |  |

# 2. Assets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Asset Type | Description | Value | Ownership | Beneficiaries |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# 3. Liabilities

|  |  |  |
| --- | --- | --- |
| Liability Type | Description | Amount Owed |
|  |  |  |
|  |  |  |
|  |  |  |

# 4. Beneficiaries

|  |  |  |
| --- | --- | --- |
| Name | Relationship | Percentage of Estate |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# 5. Funeral and Burial Instructions

|  |  |
| --- | --- |
| Funeral Type |  |
| Special Instructions |  |

Will and Asset Planner Sheet (Filled Example)

# 1. Personal Information

|  |  |
| --- | --- |
| Full Name | John Doe |
| Date of Birth | January 1, 1970 |
| Social Security Number | XXX-XX-XXXX |
| Address | 123 Main St, Anytown, USA |
| Phone Number | (123) 456-7890 |
| Email | john.doe@email.com |
| Marital Status | Married |
| Spouse's Name | Jane Doe |
| Children’s Names and Birth Dates | Emily Doe (July 12, 2000), James Doe (May 5, 2005) |
| Executor Name and Contact Information | Sarah Smith, (987) 654-3210, sarah.smith@email.com |

# 2. Assets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Asset Type | Description | Value | Ownership | Beneficiaries |
| Real Estate | 123 Main St, Anytown, USA | $300,000 | Joint (with spouse) | Jane Doe |
| Checking Account | XYZ Bank, Account #123456 | $50,000 | Sole | Jane Doe |
| 401k Retirement | XYZ Investments, Account #987654 | $100,000 | Sole | Jane Doe |
| Life Insurance | Policy #654321, ABC Insurance | $250,000 | Sole | Jane Doe |

# 3. Liabilities

|  |  |  |
| --- | --- | --- |
| Liability Type | Description | Amount Owed |
| Mortgage | 123 Main St, Anytown, USA | $150,000 |
| Credit Card Debt | ABC Credit, Account #555555 | $5,000 |

# 4. Beneficiaries

|  |  |  |
| --- | --- | --- |
| Name | Relationship | Percentage of Estate |
| Jane Doe | Spouse | 50% |
| Emily Doe | Daughter | 25% |
| James Doe | Son | 25% |

# 5. Funeral and Burial Instructions

|  |  |
| --- | --- |
| Funeral Type | Cremation |
| Special Instructions | Ashes to be scattered at family cabin |