EDDY & SCHEIN GROUP
PERSONAL FINANCE MANAGERS

Preparing to Write Your Will

Before meeting with your attorney, you'll want to gather the following information:

1. WILL
   - ☐ An existing will (if applicable)

2. ASSETS
   List of assets and approximate value (include copies of any official documentation):
   - ☐ Home(s)
   - ☐ Vehicle(s)
   - ☐ Checking and savings accounts
   - ☐ Stocks, bonds and other investments
   - ☐ IRAs and other retirement accounts, and a list of beneficiaries
   - ☐ Life insurance policies, list of beneficiaries and who pays the premiums
   - ☐ Artwork and valuables (jewelry, silver, antiques, etc.)

3. DEBTS
   List of debtors and amounts owed (include copies of bills and correspondence):
   - ☐ Mortgage(s)
   - ☐ Credit cards
   - ☐ Other loans

4. FAMILY
   - ☐ Name(s) of current and/or former spouse(s)
     - Date and place of any divorce(s) or separation(s)
     - Death certificates of deceased spouse(s)
   - ☐ Name of partner or companion
     - Copy of any agreement or contract with that person about the ownership or disposition of your property, if there is one
   - ☐ Names and birth dates of your children, and whether or not they are still living
   - ☐ Names of parents, whether or not they are still living
   - ☐ Names of siblings, whether or not they are still living
   - ☐ If you are single with no children or grandchildren, list your siblings, nieces, nephews, cousins, and cousins' children

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5. BENEFICIARIES
   - ☐ For each beneficiary, list the following:
     - Full names
     - Addresses and other contact information
     - Social Security number
     - Birth certificates or adoption papers for any minor children.
   - ☐ Indicate any trusts that need to be set up for distributions, and at what age
   - ☐ Indicate if any of your beneficiaries are on Medicaid or SSI and if your bequests need to go into a special-needs trust

6. EXECUTORS/GUARDIANS/TRUSTEES
   - ☐ List names, addresses and phone numbers for your primary and a back-up for any or all of the following:
     - Executor of your will
     - Guardian for your children
     - Trustee for any trusts

Eddy & Schein Group can help you with these preparations and with finding a geriatric health care manager.

If you, or someone you know, could benefit from having a Personal Finance Manager, please contact Eddy & Schein Group for a **free phone consultation.**

Visit our website or call us: New York 212-987-1427 or California 917-881-7042