

DATE _____

LAW OFFICES
OF
MORELLA & ASSOCIATES
A PROFESSIONAL CORPORATION
ESTATE PLANNING FACT SHEET
OF

Phone Number

Email address

MORELLA & ASSOCIATES
A Professional Corporation
706 Rochester Road
Pittsburgh, PA 15237
(412) 369-9696
Fax (412) 369-9990
<http://www.morellalaw.com>

PERSONAL INFORMATION

HUSBAND

WIFE

NAME		
CURRENT RESIDENCE (INCLUDE COUNTY)		
DATE OF BIRTH		
SOCIAL SECURITY NUMBER		
BUSINESS PHONE		
HOME PHONE		
OCCUPATION		
EMPLOYER		
U.S. CITIZENSHIP		
APPROXIMATE ANNUAL INCOME	\$	\$

PRIOR MARITAL STATUS

SINGLE _____
 DIVORCED _____
 WIDOWED _____
 OTHER _____

SINGLE _____
 DIVORCED _____
 WIDOWED _____
 OTHER _____

IF OTHER, PLEASE SPECIFY

IS A PRE- OR POST- NUPTIAL
 AGREEMENT CURRENTLY IN EFFECT?
 (IF YES, ATTACH COPY)

Y/N

Y/N

FAMILY INFORMATION

CHILDREN

NAME AND ADDRESS	DATE OF BIRTH	DISABILITY	BY FORMER MARRIAGE	MARITAL STATUS
	/ /	Y/N	Y/N	S M
	/ /	Y/N	Y/N	S M
	/ /	Y/N	Y/N	S M
	/ /	Y/N	Y/N	S M
	/ /	Y/N	Y/N	S M
	/ /	Y/N	Y/N	S M

IF YOU ANSWERED YES TO DISABILITY, PLEASE EXPLAIN.

SPECIAL CIRCUMSTANCES:

GRANDCHILDREN

NAME	ADDRESS	PARENTS	DISABILITY
			Y/N
			Y/N
			Y/N
			Y/N
			Y/N
			Y/N

IF YOU ANSWERED YES TO DISABILITY, PLEASE EXPLAIN.

SPECIAL CIRCUMSTANCES:

PROPERTY

UNDER "FORM OF OWNERSHIP", PLEASE INDICATE WHETHER THE ASSET IS:

- J - HELD JOINTLY BY HUSBAND AND WIFE
- H - HELD BY HUSBAND ONLY
- W - HELD BY WIFE ONLY

REAL ESTATE

DESCRIPTION LOCATION AND YEAR OF ACQUISITION	MARKET VALUE	CURRENT BASIS	MORTGAGE	FORM OF OWNERSHIP
	\$	\$	\$	J H W
	\$	\$	\$	J H W
	\$	\$	\$	J H W
	\$	\$	\$	J H W
	\$	\$	\$	J H W

TANGIBLE PERSONAL PROPERTY

DESCRIPTION	VALUE	FORM OF OWNERSHIP
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W

SECURITIES

DESCRIPTION	MARKET VALUE	CURRENT BASIS	FORM OF OWNERSHIP
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W
	\$	\$	J H W

CHECKING ACCOUNTS, SAVINGS ACCOUNTS, AND SAVINGS CERTIFICATES

DESCRIPTION	BALANCE	FORM OF OWNERSHIP
TYPE ACCT. #	\$	J H W
TYPE ACCT. #	\$	J H W
TYPE ACCT. #	\$	J H W
TYPE ACCT. #	\$	J H W

BUSINESS INTERESTS

DESCRIPTION*	VALUE	FORM OF OWNERSHIP
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W

* PLEASE ATTACH COPIES OF SHAREHOLDER'S RESTRICTIVE AGREEMENT AND MOST RECENT TAX RETURNS FOR ANY BUSINESS INTERESTS, IF APPLICABLE.

RETIREMENT PLANS OR OTHER DEFERRED PAYMENTS

DESCRIPTION*	PARTICIPANT	VALUE	BENEFICIARY AND FORM OF PAYMENT
		\$	
		\$	
		\$	
		\$	
		\$	

* PLEASE INDICATE IF PLAN IS QUALIFIED AND ATTACH A COPY OF RECENT PLAN STATEMENT.

LIFE INSURANCE

INSURED	OWNER*	INSURANCE COMPANY	TYPE OF POLICY	AMOUNT	BENEFICIARY
H W O	H W O			\$	H W O
H W O	H W O			\$	H W O
H W O	H W O			\$	H W O
H W O	H W O			\$	H W O

* IF THE OWNER IS NOT THE SAME AS THE INSURED, PLEASE INDICATE WHO IS PAYING THE PREMIUMS ON THE POLICY.

SIGNIFICANT LIABILITIES OTHER THAN MORTGAGE

DESCRIPTION	AMOUNT	FORM OF LIABILITY
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W
	\$	J H W

WHOM YOU WOULD LIKE TO APPOINT AS YOUR FIDUCIARIES OR AGENTS

	NAME AND ADDRESS	RELATIONSHIP
EXECUTOR OF YOUR ESTATE		
ALTERNATE #1		
ALTERNATE #2		
TRUSTEE(S) CREDIT SHELTER TRUST		
ALTERNATE #1		
ALTERNATE #2		
TRUSTEE(S) CHILD/GRANDCHILD TRUST		
ALTERNATE #1		
ALTERNATE #2		

FIDUCIARIES CONT.

	NAME AND ADDRESS	RELATIONSHIP
GUARDIAN(S) / CUSTODIAN(S) FOR MINOR CHILDREN		
ALTERNATE #1		
ALTERNATE #2		
ESTATE GUARDIAN FINANCIAL POWER OF ATTORNEY (AGENT)		
ALTERNATE #1		
ALTERNATE #2		
PERSONAL GUARDIAN HEALTH CARE POWER OF ATTORNEY (AGENT)		
ALTERNATE #1		
ALTERNATE #2		
PERSONAL GUARDIAN LIVING WILL DECLARATION (AGENT)		
ALTERNATE #1		
ALTERNATE #2		

BENEFICIARIES

NAME AND ADDRESS	RELATIONSHIP	DESCRIPTION OF GIFT

* GIVE ADDRESS AND RELATIONSHIP ONLY IF DATA IS NOT AVAILABLE ELSEWHERE.

IN YOUR OWN WORDS, PLEASE DESCRIBE HOW YOU WOULD LIKE YOUR ESTATE TO PASS:

LOCATION OF ASSETS

A big problem for anyone settling an estate is simply finding all the property and valuable papers. Please do yourself and your heirs a favor by completing the following form. Then detach the form and give copies to your spouse, other important relatives, any outside fiduciaries and your attorney. Remember to update this information periodically.

 (A) RESIDENCE _____
(ADDRESS)

 (B) SAFE DEPOSIT BOX _____
(BANK) (PHONE)

(ADDRESS)

 (C) BUSINESS OFFICE _____
(ADDRESS)

 (D) _____

 (E) _____

 (F) _____

<u>ITEM</u>	<u>LOCATION</u>					
WILL (ORIGINAL)	(A)	(B)	(C)	(D)	(E)	(F)
WILL (COPY)	(A)	(B)	(C)	(D)	(E)	(F)
POWERS OF ATTORNEY	(A)	(B)	(C)	(D)	(E)	(F)
BURIAL INSTRUCTIONS	(A)	(B)	(C)	(D)	(E)	(F)
CEMETERY PLOT DEED	(A)	(B)	(C)	(D)	(E)	(F)
SPOUSE'S WILL (ORIGINAL)	(A)	(B)	(C)	(D)	(E)	(F)
SPOUSE'S WILL (COPY)	(A)	(B)	(C)	(D)	(E)	(F)

<u>ITEM</u>	<u>LOCATION</u>					
SPOUSE'S BURIAL INSTRUCTIONS	(A)	(B)	(C)	(D)	(E)	(F)
DOCUMENT APPOINTING CHILDREN'S GUARDIAN	(A)	(B)	(C)	(D)	(E)	(F)
HANDWRITTEN LIST OF SPECIAL REQUESTS	(A)	(B)	(C)	(D)	(E)	(F)
SAFE COMBINATION, BUSINESS	(A)	(B)	(C)	(D)	(E)	(F)
SAFE COMBINATION, HOME	(A)	(B)	(C)	(D)	(E)	(F)
TRUST AGREEMENTS	(A)	(B)	(C)	(D)	(E)	(F)
LIFE INSURANCE, GROUP	(A)	(B)	(C)	(D)	(E)	(F)
LIFE INSURANCE, INDIVIDUAL	(A)	(B)	(C)	(D)	(E)	(F)
OTHER DEATH BENEFITS	(A)	(B)	(C)	(D)	(E)	(F)
PROPERTY AND CASUALTY INSURANCE	(A)	(B)	(C)	(D)	(E)	(F)
HEALTH INSURANCE POLICY	(A)	(B)	(C)	(D)	(E)	(F)
HOMEOWNERS INSURANCE POLICY	(A)	(B)	(C)	(D)	(E)	(F)
CAR INSURANCE POLICY	(A)	(B)	(C)	(D)	(E)	(F)
EMPLOYMENT CONTRACTS	(A)	(B)	(C)	(D)	(E)	(F)
PARTNERSHIP AGREEMENTS	(A)	(B)	(C)	(D)	(E)	(F)
LIST OF CHECKING AND SAVINGS ACCOUNTS	(A)	(B)	(C)	(D)	(E)	(F)
BANK STATEMENTS, CANCELED CHECKS	(A)	(B)	(C)	(D)	(E)	(F)
LIST OF CREDIT CARDS	(A)	(B)	(C)	(D)	(E)	(F)
CERTIFICATES OF DEPOSIT	(A)	(B)	(C)	(D)	(E)	(F)

<u>ITEM</u>	<u>LOCATION</u>					
CHECKBOOKS	(A)	(B)	(C)	(D)	(E)	(F)
SAVINGS PASSBOOKS	(A)	(B)	(C)	(D)	(E)	(F)
RECORD OF INVESTMENT SECURITIES	(A)	(B)	(C)	(D)	(E)	(F)
BROKERAGE ACCOUNT RECORDS	(A)	(B)	(C)	(D)	(E)	(F)
STOCK CERTIFICATES	(A)	(B)	(C)	(D)	(E)	(F)
MUTUAL FUND SHARES	(A)	(B)	(C)	(D)	(E)	(F)
BONDS	(A)	(B)	(C)	(D)	(E)	(F)
OTHER SECURITIES	(A)	(B)	(C)	(D)	(E)	(F)
CORPORATE RETIREMENT PLAN	(A)	(B)	(C)	(D)	(E)	(F)
KEOUGH OR IRA PLAN	(A)	(B)	(C)	(D)	(E)	(F)
ANNUITY CONTRACTS	(A)	(B)	(C)	(D)	(E)	(F)
STOCK-OPTION PLAN	(A)	(B)	(C)	(D)	(E)	(F)
STOCK-PURCHASE PLAN	(A)	(B)	(C)	(D)	(E)	(F)
PROFIT-SHARING PLAN	(A)	(B)	(C)	(D)	(E)	(F)
INCOME AND GIFT TAX RETURNS	(A)	(B)	(C)	(D)	(E)	(F)
TITLES AND DEEDS TO REAL ESTATE	(A)	(B)	(C)	(D)	(E)	(F)
TITLE INSURANCE	(A)	(B)	(C)	(D)	(E)	(F)
RENTAL PROPERTY RECORDS	(A)	(B)	(C)	(D)	(E)	(F)
NOTES AND OTHER LOAN AGREEMENTS	(A)	(B)	(C)	(D)	(E)	(F)
MORTGAGES	(A)	(B)	(C)	(D)	(E)	(F)

ITEM

LOCATION

LIST OF STORED AND LOANED
VALUABLE POSSESSIONS

(A) (B) (C) (D) (E) (F)

AUTO OWNERSHIP RECORDS

(A) (B) (C) (D) (E) (F)

BOAT OWNERSHIP RECORDS

(A) (B) (C) (D) (E) (F)

BIRTH CERTIFICATE

(A) (B) (C) (D) (E) (F)

CITIZENSHIP PAPERS

(A) (B) (C) (D) (E) (F)

GUARDIAN/TRUSTEE

(A) (B) (C) (D) (E) (F)

MILITARY DISCHARGE PAPERS

(A) (B) (C) (D) (E) (F)

MARRIAGE CERTIFICATE

(A) (B) (C) (D) (E) (F)

CHILDREN'S BIRTH CERTIFICATE

(A) (B) (C) (D) (E) (F)

CHILDREN'S ADOPTION PAPERS

(A) (B) (C) (D) (E) (F)

DIVORCED/SEPARATION RECORDS

(A) (B) (C) (D) (E) (F)

NAMES AND ADDRESSES OF
RELATIVES AND FRIENDS

(A) (B) (C) (D) (E) (F)

LISTING OF PROFESSIONAL AND
FRATERNAL ORGANIZATION
MEMBERSHIPS

(A) (B) (C) (D) (E) (F)

OTHER:

PROFESSIONALS

LAWYER

NAME

PHONE NUMBER

ADDRESS

ACCOUNTANT

NAME

PHONE NUMBER

ADDRESS

STOCKBROKER

NAME

PHONE NUMBER

ADDRESS

INSURANCE
AGENT

NAME

PHONE NUMBER

ADDRESS

TRUST OFFICER

NAME

PHONE NUMBER

ADDRESS

DATE PREPARED

COPIES GIVEN
TO:

