



2330 Scenic Highway  
Snellville, GA 30078

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**CONFIDENTIAL ESTATE PLANNING FORM**

DATE: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_

CELL: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_

CHILD 1: \_\_\_\_\_

CHILD 2: \_\_\_\_\_

CHILD 3: \_\_\_\_\_

CHILD 4: \_\_\_\_\_

DO YOU WISH TO BE BURIED OR CREMATED? \_\_\_\_\_

DO YOU WISH TO HAVE A SERVICE: \_\_\_\_\_

IF YES, WHERE? \_\_\_\_\_

EXECUTOR: \_\_\_\_\_

SUCCESSOR EXECUTOR: \_\_\_\_\_

GUARDIAN FOR MINOR CHILDREN: \_\_\_\_\_

LIFE INSURANCE POLICY 1: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

LIFE INSURANCE POLICY 2: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

LIFE INSURANCE POLICY 3: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

STOCKS, BONDS, ANNUITIES: \_\_\_\_\_ VALUE: \_\_\_\_\_

STOCKS, BONDS, ANNUITIES: \_\_\_\_\_ VALUE: \_\_\_\_\_

STOCKS, BONDS, ANNUITIES: \_\_\_\_\_ VALUE: \_\_\_\_\_

SAFE DEPOSIT BOX LOCATION: \_\_\_\_\_

**REAL ESTATE/PROPERTY:**

REAL ESTATE/HOUSE ADDRESS: \_\_\_\_\_

REAL ESTATE/HOUSE ADDRESS: \_\_\_\_\_

REAL ESTATE/HOUSE ADDRESS: \_\_\_\_\_

**VEHICLES:**

VEHICLE DESCRIPTION: \_\_\_\_\_

VEHICLE DESCRIPTION: \_\_\_\_\_

VEHICLE DESCRIPTION: \_\_\_\_\_

