Click or tap here to enter text.

**ESSENTIAL ESTATE PLANNING INFORMATION**

Important Client Information:

Name/s: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone Numbers: Click or tap here to enter text.

Birth Date/s: Click or tap here to enter text.

Social Security Number/s: Click or tap here to enter text.

Safe or Safe Deposit Box Location (and combo or key location): Click or tap here to enter text.

**CONTACT INFORMATION:**

Attorney:

Wiggins & Ebert, APC (Jason Ebert)

Address: 2534 State Street, 2nd Floor, San Diego, California 92101

Phone: (619) 239-2252

Fax: (866) 875-9377

Email: wigginsandebert@gmail.com

Website: wigginsandebert.com

Financial Adviser:

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

Accountant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

Important Contacts in an Emergency:

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

Name Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

**Medical Information**

Medical Insurance Information: *(If you have general health insurance policies, Medicare,*

*Medi-Cal or long term care insurance policies, I recommend providing that information here)*

1. Insured Individual: Click or tap here to enter text.
2. Provider and Policy Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

1. Insured Individual: Click or tap here to enter text.
2. Provider and Policy Number: Click or tap here to enter text.

2) Customer Service Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Long Term Care Insurance: Click or tap here to enter text.
2. Provider and Policy Number: Click or tap here to enter text.
3. Customer Service Number: Click or tap here to enter text.
4. Long Term Care Insurance: Click or tap here to enter text.

1) Provider and Policy Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

1. Contract Information for any Mortuary or Cremation Company:

1) Provider and Policy Number: Click or tap here to enter text.

2) Phone Number: Click or tap here to enter text.

**ASSET INFORMATION**

**(Simply delete any additional sections if you don’t have the assets referenced below)**

I. Life Insurance: (ie: Metropolitan Life Insurance, Policy No. 1234;

Primary Beneficiary: Spouse 100%; Backup Beneficiary Joe Smith)

1. Owner: Click or tap here to enter text. (Name of insured)
2. Provider and Policy Number: Click or tap here to enter text.
3. Customer Service Number: Click or tap here to enter text.
4. Beneficiaries on the Policy: Click or tap here to enter text.
5. Value of Policy: Click or tap here to enter text.

B. Owner: Click or tap here to enter text. (Name of insured)

1) Provider and Policy Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries on the Policy: \_Click or tap here to enter text.

4) Value of Policy: Click or tap here to enter text.

II. Banking Information: (ie: Bank of America Checking Account, No. 1234

titled in The John Smith Trust)

1. Bank/Account Type/Account Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name/Title on Account: Click or tap here to enter text.

(ie: Owner’s name alone, husband and wife as joint tenants, Trust)

1. Bank/Account Type/Account Number: Click or tap here to enter text.

Name/Title on Account: Click or tap here to enter text.

1. Bank/Account Type/Account Number: Click or tap here to enter text.

Name/Title on Account: Click or tap here to enter text.

1. Bank/Account Type/Account Number: Click or tap here to enter text.

Name/Title on Account: Click or tap here to enter text.

III. Retirement Plan and Annuity Information: (401Ks, Pensions, IRAs, Annuities, etc)

1. Owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Provider, account type and account Number: Click or tap here to enter text.

(ie: Fidelity IRA Account, No. 1234)

1. Customer Service Number: Click or tap here to enter text.
2. Beneficiaries: Click or tap here to enter text.
3. Provider, account type and account Number: Click here to enter text.

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries: Click or tap here to enter text.

1) Provider, account type and account Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries: Click or tap here to enter text.

1. Owner: Click or tap here to enter text.:

1) Provider, account type and account Number: Click or tap here to enter text.

(ie: Fidelity IRA Account, No. 1234)

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries: Click or tap here to enter text.

1) Provider, account type and account Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries: Click or tap here to enter text.

1) Provider, account type and account Number: Click or tap here to enter text.

2) Customer Service Number: Click or tap here to enter text.

3) Beneficiaries: Click or tap here to enter text.

IV. Loan and Debt Information:

1. Loan Information: (Type of loan, provider, account number – ie: Home Equity

Line of Credit with Wells Fargo, No. 1234)

1. Type of loan, provider and account number: Click or tap here to enter text.
2. Customer service number: Click or tap here to enter text.
3. Type of loan, provider and account number: Click or tap here to enter text.
4. Customer service number: Click or tap here to enter text.
5. Type of loan, provider and account number: Click or tap here to enter text.
6. Customer service number: Click or tap here to enter text.
7. Credit Card Information: (Provider and account number – ie: VISA CC,

Account No. 1234)

1. Provider and account number: Click or tap here to enter text.
2. Customer service number: Click or tap here to enter text.

1) Provider and account number: Click or tap here to enter text.

2) Customer service number: Click or tap here to enter text.

1) Provider and account number: Click or tap here to enter text.

2) Customer service number: Click or tap here to enter text.

1. Loans to 3rd Parties: If you have a promissory note or other outstanding loan

with a 3rd party, enter that information here for reference.

1. Lender Name: Click or tap here to enter text.
2. Amount of Loan and Interest Rate: Click or tap here to enter text.
3. Lender Phone Number: Click or tap here to enter text.

V. Password Information:

Email Address: Click or tap here to enter text. Username:Click or tap here to enter text. Password: Click or tap here to enter text.

Email Address: Click or tap here to enter text. Username:Click or tap here to enter text. Password: Click or tap here to enter text.

Email Address: Click or tap here to enter text. Username:Click or tap here to enter text. Password: Click or tap here to enter text.

Bank: Click or tap here to enter text.Username: Click or tap here to enter text. Password: Click or tap here to enter text.

Bank: Click or tap here to enter text.Username: Click or tap here to enter text. Password: Click or tap here to enter text.

Bank: Click or tap here to enter text.Username: Click or tap here to enter text. Password: Click or tap here to enter text.