



GETTING STARTED: **ESTATE PLANNING (PT. 2)**

When it comes to estate planning, getting started can be the hardest part. A recent study found that nearly **68% of Americans do not have an estate plan**—36% of which simply “**haven’t gotten around to it.**” This worksheet is intended to keep you organized and ahead of the curve.

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Providence Capital Partners, Inc., a registered investment advisor. Providence Capital Partners, Inc. and Denver Wealth Management are separate entities from LPL Financial.

This information is not intended to be a substitute for individualized legal advice. Please consult your legal advisor regarding your specific situation.

BANK ACCOUNTS

Bank Contact Information	Titling ¹	Account No. & Type	Beneficiary	Fair Market Value
Total Banks Accounts				

BROKERAGE ACCOUNTS

Brokerage Firm Contact Information	Titling ¹	Account No.	Beneficiary	Fair Market Value
Total Brokerage Accounts				

SECURITIES IN CERTIFICATE FORM

Name of Stock, Bond, etc.	Titling ¹	CUSIP No. ²	Number of Shares	Fair Market Value
Total Securities in Certificate Form				

INDIVIDUAL RETIREMENT ACCOUNTS

Investment Firm Contact Information	Type ³ & Account No.	Account Owner	Beneficiary	Fair Market Value
Total Individual Retirement Accounts				

EMPLOYER-SPONSORED RETIREMENT PLANS

Type	Plan Contact Information	Account No.	Participant	Beneficiary	Value
Employer-Sponsored Plans ⁴					
Employer-Sponsored Plans ⁴					
Employee Stock Option					
Deferred Compensation					
Pension/Profit-Sharing					
Veterans/Govt. Benefits					
Total Employer-Sponsored Retirement Plans & Retirement Benefits					

¹Titling abbreviations: IND for individual; JTWROS for joint tenancy with rights of survivorship; TE for tenancy by the entirety; CP for community property; CPWROS for community property with rights of survivorship; TC for tenants in common.

²CUSIP No.: This is the standardized identification number assigned to issues of stocks and bonds and is usually found on the certificate near the number of shares.

³Individual retirement account types include IRAs, Roth IRAs, and Rollover IRAs.

⁴Employer-Sponsored retirement plans include 401(k), SEP, SIMPLE, 403(b) and 457 plans, and others.

INSURANCE

Plan	Firm Contact Information	Policy No./Type ⁵	Policy Owner	Beneficiary	Loans on Policy	Net (of Loans) Face Amt.
Life						
Medical						
Disability						
Homeowners/Renters						
Auto						
Total Insurance: Net Face Amount						

REAL ESTATE

Type of Property & Location	Titling ¹	Fair Market Value	Mortgage Amount	Value (Net of Mortgage)
Total Real Estate				

SAFE DEPOSIT BOX

Box Contact Information	Box No.	Contents	Executor	Location of Key

⁵Insurance policy types include GRP for group, INT for individual team, WHL for individual whole life (cash value), and SWL for survivorship (second to die).

PERSONAL PROPERTY

Type	Titling ¹	Description	Fair Market Value
Auto			
Auto			
Home Furnishings			
Collectibles			
Other			
Total Personal Property			

UNSECURED DEBTS

Lender Contact Information	Type ⁶	Balance Outstanding
Total Unsecured Debts		

DEBT OWED TO YOU

Borrower	Contact Information	Notes	Balance Outstanding
Total Debt Owed to You			

⁶Unsecured debt types include credit cards, personal lines of credit, etc.

BUSINESS INTERESTS

Business Contact Information	Titling ¹	Ownership Percentage	Entity Type ⁷	Fair Market Value
Total Business Interests				

NOTES

⁷Entity types include SOLE for sole proprietorship, PART for partnership, SUB C for “regular” corporations, SUB S for subchapter S corporations, LLC for limited liability companies, and LLP for limited liability partnerships.