

VANDENACK WEAVER LLC

Attorneys at Law

17007 Marcy Street, Suite 3, Omaha, NE 68118

Phone: (402) 504-1300; FAX: (402) 504-1935; Email: info@VWattys.com

www.VWattys.com

SUPPLEMENTAL INFORMATION TO ESTATE PLANNING INFORMATION LIST

Prior to submitting information via this form, please review our web site terms and conditions which you can find at VWattys.com. By submitting information via this form, you acknowledge that you have read and agree to our web site terms and conditions. If you would like information about how to submit this form to us in a secure manner, please contact us at info@VWattys.com.

It is important that we know how your assets are titled and their approximate value so that we may provide appropriate recommendations regarding your estate plan. If you have recently prepared a detailed financial statement, you may provide that; otherwise, please use this form to assist you in assembling the information.

ASSETS

Real Estate (including your home):

| <u>Description</u> | <u>Title</u> | <u>Value</u> |
|--------------------|--------------|--------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Bank Accounts, Money Market Accounts, and CDs:

| <u>Institution</u> | <u>Account No.</u> | <u>Title</u> | <u>Value</u> |
|--------------------|--------------------|--------------|--------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Public Stocks, Bonds or Brokerage Accounts (please bring proof of ownership, i.e., monthly or quarterly statements):

| <u>Institution</u> | <u>Account No.</u> | <u>Title</u> | <u>Value</u> |
|--------------------|--------------------|--------------|--------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Closely Held Stock or Business Interests:

Please describe name, form (corporation, partnership, limited liability company, etc.), nature of business, and percentage of ownership).

| <u>Business Name</u> | <u>Business Form</u> | <u>Nature of Business</u> | <u>% of Ownership</u> |
|----------------------|----------------------|---------------------------|-----------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Tangible Personal Property:

Please list any personal items such as jewelry, collectibles, guns or household items. Tangible Personal Property DOES NOT include cash or automobiles.

| <u>Item</u> | <u>Value</u> | <u>Item</u> | <u>Value</u> |
|-------------|--------------|-------------|--------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Insurance/Annuities:

| <u>Insured</u> | <u>Company & Owner Policy No.</u> | <u>Type</u> | <u>Benef.</u> | <u>Cash Value</u> | <u>Face Value</u> |
|----------------|---------------------------------------|-------------|---------------|-------------------|-------------------|
| _____ | _____ | _____ | _____ | _____ | _____ |

Insurance/Annuities (continued):

| | | | | | |
|-------|-------|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |

Digital Assets:

| <u>Description</u> | <u>Value</u> |
|--------------------|--------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

LIABILITIES

| <u>Debtor</u> | <u>Lender</u> | <u>Amount</u> | <u>Security</u> |
|---------------|---------------|---------------|-----------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

TAX RETURNS

Please provide us with copies of your tax returns for the **last 3 years**.

ADDITIONAL INFORMATION