

VANDENACK WILLIAMS LLC

Attorneys at Law

17007 Marcy Street, Suite 3, Omaha, NE 68118

Phone: (402) 504-1300; FAX: (402) 504-1935; Email: [info@vanwil.com](mailto:info@vanwil.com)

[www.vanwil.com](http://www.vanwil.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 [vanwil.com](http://vanwil.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@vanwil.com](mailto:info@vanwil.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 &amp; 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**