



# ESTATE PLANNING FACT FINDER

Protect Your Kingdom





## Financial Information

Pre-Retirement		
Earned Income (salary)	You	
Earned Income (salary)	Spouse	
Other Income		
Other Income		
<b>Total Pre-Retirement Income:</b>		

Post-Retirement		
Earned Income	You	
Earned Income	Spouse	
Social Security	You	
Social Security	Spouse	
Pension	You	
Pension	Spouse	
Other Income		
Other Income		
<b>Total Post-Retirement Income:</b>		

<b>Total Sources of Income:</b>	
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## Assets and Liabilities

We need to have a clear picture of your finances to assist you. This information is personal, so we'll keep it private. If additional space is needed, feel free to provide separate financial statement.

### Personal Information Summary

Personal Assets	Asset Value	Liabilities	Owner	Growth Rate
Residence				
Business Building				
Vacation Home				
Rental Property				
Land				
Business				
Personal Property				
Vehicles				
Collectibles				
Future Inheritances				
Cash and Equivalents*				
Investments**				
Retirement Plans - You				
Retirement Plans - Spouse				
IRAs - You				
IRAs - Spouse				
Roth IRAs - You				
Roth IRAs - Spouse				
Annuities - You				
Annuities - Spouse				
Other_____				
Other_____				
Other_____				

## Life Insurance

Company	Type	Insured	Owner	Beneficiary	Death Benefit	Annual Premium	Cash Value
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
<b>Total Life Insurance</b>					\$	\$	\$

## Long-Term Care Insurance

Insured	Daily Benefit	Benefit Duration	Death Benefit	Cost of Living	Annual Premium	Premium Payments Remaining	Policy End Date
	\$		\$	%	\$		
	\$		\$	%	\$		
<b>Total Long-Term Care</b>					\$		

## Disability Insurance

Description	Benefit Amount	Premium	Ownership Code	Elimination Period	Group or Individual



## Estate Plan Details

### Testamentary Plans

#### Present Estate Plan

Do you have a will?  Yes  No Date of Will \_\_\_\_\_

Have you used an irrevocable life insurance trust to exclude insurance proceeds from being taxed to your estate?  Yes  No

Do you have a revocable living trust?  Yes  No

Does your spouse have a will?  Yes  No Date of Will \_\_\_\_\_

Has your spouse used an irrevocable life insurance trust to exclude insurance proceeds from being taxed to your estate?  Yes  No

Does your spouse have a revocable living trust?  Yes  No

Have you utilized a gift-giving program to reduce the size of your gross estate?  Yes  No

Do you have a prenuptial agreement?  Yes  No

If yes, describe \_\_\_\_\_

If you own a business, do you have a succession plan in place?  Yes  No

If yes, describe \_\_\_\_\_

Are you active in any associations, charities or alumni organizations?  Yes  No

If yes, please list \_\_\_\_\_

### Your Estate Plan Objectives

How would you like your estate to be distributed at your death, assuming you die first? \_\_\_\_\_

How would your spouse like his/her estate to be distributed at death, assuming your spouse dies first? \_\_\_\_\_

How much annual income will you need to retire? \_\_\_\_\_

What will be the source of that income? \_\_\_\_\_

Do you or your spouse plan to bequeath money/assets to a charity at death? If yes, explain. \_\_\_\_\_

**Additional Estate Planning Information** \_\_\_\_\_

<b>Financial Professional(s)</b>		
Phone		
Email		
<b>Attorney</b>		
Phone		
Email		
<b>Accountant</b>		
Phone		
Email		

**Notes:**

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**Why Mutual of Omaha**

Over 50 years of Mutual of Omaha’s Wild Kingdom taught us that the animal kingdom and the human kingdom have something in common ... an instinct to protect what matters most. Through insurance and financial products, we help people protect their lives, protect their families, protect their kingdoms.

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