

To receive a complete copy of this Estate Plan Workbook via email or regular mail, please email info@wellsmar.com or call Carolyn Dale at (601) 605-6900.

ESTATE PLAN WORKBOOK

Compliments of:

**WELLS MARBLE & HURST, PLLC
300 Concourse Blvd., Suite 200
Ridgeland, Mississippi 39157
Post Office Box 131
Jackson, Mississippi 39205
(601) 605-6900
FAX: (601) 605-6901**

This Estate Plan Workbook is designed to assist you in formulating your estate plan. In that regard, it serves as a checklist to make sure you have considered all of factors that must be explored in order to make a thorough, comprehensive estate plan. It also contains information you and your loved ones can use during what is, under the best of circumstances, a difficult time. This Workbook catalogs your important information about the existence and location of important documents, assets and liabilities, the identity and contact information of your advisors, and other information about yourself and your estate. It also serves to communicate your personal desires and wishes concerning, among other things, your funeral service, the disposition of your earthly remains, and your wishes for your family. This document is not intended to replace your Will or other estate planning documents; however, it can provide insight and assistance to your personal representatives and family members in making any discretionary decisions for you, your estate and your family.

TABLE OF CONTENTS

<u>CHAPTER</u>		<u>PAGE</u>
PART I - INFORMATION NEEDED TO PLAN YOUR ESTATE		
1	Personal Information	1-1
2	Financial Information	2-1
PART II - INFORMATION YOUR LOVED ONES NEED WHEN YOU PASS AWAY OR BECOME INCAPACITATED		
3	General Information	3-1
4	Personal Advisors	4-1
5	Insurance Coverages	5-1
6	Documents	6-1
7	Family History	7-1
8	Desires for My Family	8-1
9	In the Event of My Death	9-1
PART III - CHECKLISTS		
10	Checklist for Reviewing Estate Plan	10-1
11	Checklist of Documents to Bring to Initial Conference with Attorney	11-1
12	Survivor's Guide and Checklist	12-1
13	Checklist of Executor's Duties	13-1
PART IV - GLOSSARY		
14	Glossary of Terms	14-1