Morgan Stanley

Checklist for Clients
Estate Planning Strategies

Wealth and Estate Planning Strategists
Family Office Resources

Estate Planning Documents

- ☐ Wills
- ☐ Revocable Trusts
- ☐ Irrevocable Trusts created by you or by someone else for the benefit of you or your descendants/family
- ☐ Ancillary documents

  (e.g., Powers of Attorney, Health Care Proxies/Directives, Living Wills)

Tax Information

- ☐ Most recently filed gift tax returns

Family Information

- ☐ Names and dates of birth for you, your spouse, children and grandchildren

Financial Statements and Records

- ☐ Recent statements for bank, investment, retirement, and annuity accounts
- ☐ Investment properties and personal use property, including residential real estate and valuable collections
- ☐ Closely held businesses/privately held companies
  (include the number of shares/units or percentage ownership and corresponding values)
- ☐ Safe deposit boxes
- ☐ Information to show how each account, property, or asset is titled
- ☐ Beneficiary designation details for bank, investment, retirement, and annuity accounts

Life Insurance

- ☐ Name of carrier
- ☐ Type of insurance
  (e.g., whole, term)
- ☐ Policy owner
- ☐ Name of insured
- ☐ Policy beneficiary/ies
- ☐ Annual cost of premiums
- ☐ Current cash value
- ☐ Death benefit
- ☐ Amount of outstanding loans

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