

**Christian Estate Planning Booklet**  
**for**  
**Married Couples**

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**559/256-0867**

# Estate Planning Data Form

Husband's Name: \_\_\_\_\_  
First Middle Last

Wife's Name: \_\_\_\_\_  
First Middle Last

Address: \_\_\_\_\_  
Street City State Zip

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_  
Residence Business

Church: \_\_\_\_\_ City: \_\_\_\_\_

Date of Birth: (H) \_\_\_\_\_ Last 4 digits SS # (H) \_\_\_\_\_

Date of Birth: (W) \_\_\_\_\_ Last 4 digits SS # (W) \_\_\_\_\_

U.S. Citizen: (H) Yes  No  (W) Yes  No  Date of Marriage: \_\_\_\_\_

Previous Marriage (check if applicable):

Divorced: (H) Yes  No  (W) Yes  No  Widowed: (H) Yes  No  (W) Yes  No

Do you now have a Will or Trust? Yes  No  If convenient, please attach a photocopy.

## Children:

Please indicate the parent of each child listed below: (H) Husband; (W) Wife; (B) Both

1st: \_\_\_\_\_  
Name Birthdate Telephone  
(H)  (W)  (B)

Address \_\_\_\_\_

2nd: \_\_\_\_\_  
Name Birthdate Telephone  
(H)  (W)  (B)

Address \_\_\_\_\_

3rd: \_\_\_\_\_  
Name Birthdate Telephone  
(H)  (W)  (B)

Address \_\_\_\_\_

4th: \_\_\_\_\_  
Name Birthdate Telephone  
(H)  (W)  (B)

Address \_\_\_\_\_

**Guardian for Children:**

1st: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

2nd: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

**Executor/Trustee:**

1st: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

2nd: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

3rd: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

**Power of Attorney/Finances:**

1st: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

2nd: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

**Power of Attorney/Health Care (AHCD):**

1st: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

2nd: \_\_\_\_\_  
Name Relationship Telephone  
\_\_\_\_\_  
Address

**Real Estate: List all real estate**

Property A: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Date Acquired: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Please indicate ownership: Husband  Wife  Joint  Trust  Current Value: \_\_\_\_\_

Property B: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Date Acquired: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Please indicate ownership: Husband  Wife  Joint  Trust  Current Value: \_\_\_\_\_

Property C: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Date Acquired: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Please indicate ownership: Husband  Wife  Joint  Trust  Current Value: \_\_\_\_\_

Property D: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Date Acquired: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Please indicate ownership: Husband  Wife  Joint  Trust  Current Value: \_\_\_\_\_

Property E: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Date Acquired: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Please indicate ownership: Husband  Wife  Joint  Trust  Current Value: \_\_\_\_\_

TOTAL REAL ESTATE: \$ \_\_\_\_\_

**Cash and Other Assets: You may use approximate value.**

Cash (Approximate value.

List Banks checking, savings, CD's, etc.):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Current Value:                      Indicate Ownership:**

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

Stocks, Bonds & Mutual Funds  
other than Retirement

(List name of company, current):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Current Value:                      Indicate Ownership:**

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

Business Interest:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Current Value:                      Indicate Ownership:**

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

Personal Property (Vehicle, furniture,  
antiques, art, jewelry, collections, etc.):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Current Value:                      Indicate Ownership:**

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

\$ \_\_\_\_\_ Husband  Wife  Joint  Trust

**TOTAL CASH & OTHER ASSETS:**                      \$ \_\_\_\_\_

## Retirement Assets

### Husband's Individual Retirement Accounts and/or Tax Sheltered Annuities:

| Company: | Beneficiary: | Current Account Value: |
|----------|--------------|------------------------|
| _____    | _____        | \$ _____               |
| _____    | _____        | \$ _____               |
| _____    | _____        | \$ _____               |

### Wife's Individual Retirement Accounts and/or Tax Sheltered Annuities:

| Company: | Beneficiary: | Current Account Value: |
|----------|--------------|------------------------|
| _____    | _____        | \$ _____               |
| _____    | _____        | \$ _____               |
| _____    | _____        | \$ _____               |

TOTAL RETIREMENT ASSETS: \$ \_\_\_\_\_

## Life Insurance Policies

### Husband's Life Insurance:

| Insured: | Company: | Policy Type: | Beneficiary: | Death Benefit |
|----------|----------|--------------|--------------|---------------|
| _____    | _____    | _____        | _____        | \$ _____      |
| _____    | _____    | _____        | _____        | \$ _____      |
| _____    | _____    | _____        | _____        | \$ _____      |

### Wife's Life Insurance Policies:

| Insured: | Company: | Policy Type: | Beneficiary: | Death Benefit |
|----------|----------|--------------|--------------|---------------|
| _____    | _____    | _____        | _____        | \$ _____      |
| _____    | _____    | _____        | _____        | \$ _____      |
| _____    | _____    | _____        | _____        | \$ _____      |

TOTAL LIFE INSURANCE POLICIES: \$ \_\_\_\_\_

TOTAL OF ALL ASSETS: \$ \_\_\_\_\_

**Distributions**

Gifts to Your Family: \_\_\_\_\_ %

Designate Beneficiaries and Percentage:

\_\_\_\_\_  
\_\_\_\_\_

Gift to Charity: \_\_\_\_\_ %

CSBC Ministries to Consider:

- |                     |                       |                       |                              |
|---------------------|-----------------------|-----------------------|------------------------------|
| California Missions | Church Revitalization | Disaster Relief       | Youth and College Ministries |
| Evangelism          | Migrant Missions      | Jeness Park           |                              |
| Church Planting     | Women's Ministry      | Children's Ministries |                              |

Designate Beneficiaries and Percentage:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Conflict & Waiver Agreement – CSBC**

I understand that the attorney I will be meeting with is employed by the California Southern Baptist Convention (CSBC). I understand the attorney will be reviewing my documentation and drafting my estate plan according to my instructions. I agree that the information I have provided on this form is accurate and complete and any dispute or claim arising from these services shall be submitted to arbitration. I am choosing to make a charitable gift to a Southern Baptist cause, and understand that there may be a conflict of interest. I have been advised that I am free to seek private legal counsel, should I prefer.

Husband Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Wife Signature: \_\_\_\_\_ Date: \_\_\_\_\_