MEMBER

Choice & Voice

A Planner to Help Organize Your Estate Plan

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To create a charitable legacy that is rich in meaning and impact, it is important to begin the planning process by gathering your financial information in one place. Use this step-by-step planner to organize all the information pertinent to your estate plan and assets. Completing it will result in a valuable resource that you can use in meetings with your attorney and your family, and as a personal reference.

This highly personal information should be kept in a secure location to protect your privacy and the security of your financial assets.

Contains Confidential and Personal Information (Keep in Secure Location)

Date: ______________________________

Name(s): ______________________________

Address: ______________________________

City: ____________________ State: ______________ ZIP code: ______________

Telephone number: ______________ Email: ______________________________

Personal Advisers

List the names of personal advisers with whom you have a current working relationship.
(If you are not currently working with someone in these roles, please indicate it in the blank space.)

POSITION	FIRM	NAME	ADDRESS	PHONE
Attorney				
Accountant				
Bank or Trust Officer				
Investment Broker				
Life Insurance Agent				
Other				
Other				

Personal Information

I was born in: ______________________ on: ____________
(City and state) (Date)

Location of birth certificate: ____________ Location of copy: ____________

Social Security number: ____________ Location of Social Security card: ____________

Marital status: ❑ Single ❑ Married ❑ Widowed ❑ Divorced ❑ Legally separated

Spouse's name: ____________ Date of birth: ____________ Social Security number: ____________

Place and date of marriage: ____________ Location of certificate: ____________
(City and state, date)

There (check one) ❑ is ❑ is not a prenuptial agreement.

Location of prenuptial agreement (if applicable): ____________

Name(s) of previous spouse(s) (if applicable): ____________ Date(s) of marriage(s): ____________

Marriage(s) terminated by (check one) ❑ Death ❑ Divorce ❑ Legal separation

Location of papers: ____________

U.S. citizen (check one) ❑ Yes ❑ No

If not U.S citizen by birth, list date and place of naturalization: ____________

Location of papers: ____________ Other citizenship: ____________

U.S. government publication 121Z, "Where to Write for Vital Records," provides information on obtaining certified copies of birth, death, marriage, and divorce records. Send a check or money order (payable to Superintendent of Documents) for $1.75 to R. Woods, Consumer Information Center, 3C, PO Box 100, Pueblo, CO 81002, or go to http://www.cdc.gov/nchs/howto/w2w/w2welcom.htm.

Tax and Social Security Records

My last Social Security earnings report is located at: ____________

❑ I have a Social Security online account.

My Social Security checks are directly deposited to my account number: ____________

at ____________ Address ____________
(Financial institution) (Complete address)

My federal, state, and city (if applicable) income tax returns for the years: ____________

are located at: ____________
(Name, complete address, telephone number)

Tax preparer: ____________ Address: ____________

Military Service

I served in the: ______________ from: ____________ to: _____________ . Serial number: ______________________

Medical Records

POSITION	NAME	ADDRESS	PHONE
Physician			
Dentist			
Other			
Other			
Other			

Living Will

I have a living will stating my wishes for medical care and treatment if I am seriously ill: ☐ Yes ☐ No

The document is dated: ______________ and is located at: ____

Individuals who have copies are:

Name: ____ Phone: ________________________________

Address: ____

Name: ____ Phone: ________________________________

Address: ____

Power of Attorney for Health Care

I have given a Power of Attorney for health care decisions to: ____

Name: _________________________________ Telephone number: ______________________________________

Address: ____

The power of attorney is dated _______________ A copy is located at __________________________________

If you have not made a will or an estate plan, consider using FreeWill, at freewill.com/consumerreports. FreeWill has developed an intuitive, online will-writing tool that guides you through creating a fully valid legal will in your jurisdiction or takes you through planning your will before seeing an attorney. This tool is free to you regardless of whether you decide to include a gift to Consumer Reports.

Pension Information

I am a participant in the following pension, retirement, and death benefit plans:

TYPE OF PLAN	COMPANY NAME AND ADDRESS	VALUE	BENEFICIARY

Employee benefits officer: __________ Company: __________ Phone: __________

Employee benefits officer: __________ Company: __________ Phone: __________

Employee benefits officer: __________ Company: __________ Phone: __________

Papers relating to my current business connections and agreements (e.g., buy-sell agreements, stock purchase plans, stock options) are located at: __________

Assets

BANK NAME	ACCOUNT NUMBER	ADDRESS	JOINT OWNER*

*See clarification on next page.

These records are also on my home computer, filed under: __________

Note:

*If the joint owner is not your spouse, keep accurate records showing how the assets were acquired and with whose funds. Estate and gift tax consequences will often depend on how the property was acquired. Good record keeping can often reduce taxes.

You should also note if any jointly owned assets are community property or property acquired during marriage.

Individual who has power to sign checks for me:

Name: ______________________________

Address: ______________________________

____

Certificates of Deposit

BANK NAME	ADDRESS	AMOUNT	MATURE DATE	CERTIFICATE NUMBER

My bank records are located at: ______________________________

____

Safe Deposit Boxes

BOX LOCATION	ADDRESS	BOX NUMBER	KEY LOCATION	OTHER PEOPLE W/ ACCESS

Securities (Attach list if needed)

COMPANY/FUND	ADDRESS	JOINTLY HELD*	SHARES	PURCHASE DATE

*See clarification on page 6.

My securities are located at: ______________________________

My brokerage/mutual fund statements are located at: ______________________________

My stockbroker is: ______________________ Firm: ______________________

Address: ______________________________ Phone ______________

❑ The securities on the previous page are pledged against loans.

They are held by: ______________________ Firm: ______________________

Address: ______________________________ Phone: ______________

Closely Held Stock and/or Limited Partnerships (Other Interests)

INVESTMENT	JOINTLY HELD*	AMOUNT	DATE OF INVESTMENT	PERCENTAGE OF OWNERSHIP

*See clarification on page 6.

Government Securities

TYPE OF SECURITY	JOINTLY HELD*	SERIAL NO.	DATE OF PURCHASE	WHERE RECORDS ARE LOCATED

*See clarification on page 6.

Individual Retirement Accounts

NAME OF FUND	COMPANY	ACCOUNT	ADDRESS	PHONE

Insurance Policies (Accident/Disability/Heath Care)

TYPE	COMPANY	POLICY NO.	COVERAGE	WHERE RECORDS ARE LOCATED

My accident, disability, and health insurance agents are:

Address: ______________________________

Phone: ______________________________

Life Insurance Policies

COMPANY	POLICY NUMBER	VALUE	BENEFICIARIES

These policies and any supporting papers are located at: ______________________________

I have unpaid loans against these policies: ______________________________

Policy number: ______________ Amount of loan: $ ______________ Amount still due: $ ______________

Companies or organizations holding insurance policies on my life:

Company: ______________________________ Amount of coverage: $ ______________

Beneficiary(ies): ______________________________

The following are policies on my life owned by others:

Owner: ______________ Relationship: ______________

Address: ______________________________

Person paying premium: ______________________________

Insurance company: ______________ Policy number: ______________ Face value: $ ______________

I own the policies on the lives of:

Name of insured: ______________ Insurance company: ______________

Policy number: ______________ Face value: $ ______________

Beneficiary(ies): ______________________________

Real Estate Owned (Attach list if needed)

DESCRIPTION	LOCATION	STATUS HELD	JOINTLY HELD*

* See clarification on page 6.

Title is held:

- ❑ in my name only
- ❑ together with (fill in name): ______________________
- ❑ as tenants by the entirety
- ❑ as joint tenants (right of survivorship)
- ❑ as tenants in common/as community property

The remaining mortgage on the property is $ __________ held by: ______________________

All papers pertaining to real estate holdings are located at: ______________________

____

Other Income-Producing Assets (Patents, Copyrights, etc.)

PROPERTY	ANNUAL INCOME	DUE DATES	NOTES

Future or Contingent Income or Assets

I (check one) ❑ am ❑ expect to be the beneficiary of a bequest.

Name of testator: ______________________ Approximate value: $ ______________________

I (check one) ❑ am ❑ expect to be the beneficiary of a trust fund.

Name of trust: ______________________ Approximate value: $ ______________________

I (check one) ❑ am ❑ expect to be the beneficiary of other income or assets.

Description and value: ____

Papers pertaining to the above agreements are located at: ______________________

____

What I Owe

CREDIT CARDS	CARD NUMBER / ACCOUNT	ISSUED BY / ADDRESS	PHONE

Loans

LOAN TYPE	CREDITOR	LOAN NO.	AMOUNT	PAYMENT DATE	$ AMOUNT
Auto					
Home					
Other					

All other debts and obligations:

____

____

____

____

____

Last Will and Testament

I (check one) ❏ have ❏ have not made a will. Will (if applicable) dated: ____________________

The original executed copy of my wills and codicils (if applicable) are located at: ____________________

____

POSITION	NAME	ADDRESS	PHONE
Executor(s)			
Alternate Executor(s)			
Trustee(s)			
Alternate Trustee(s)			
Guardians for My Children			
Alternate Guardians			
Wills & Codicils Drafted by:			

Trusts

I (check one) ❑ have ❑ have not

created a living trust (inter vivos). Beneficiary(ies) of trust (if applicable): ______________________

____

Other Instructions

Vehicles

Registration and other papers regarding my vehicle(s) may be found at: ______________________

Homeowner Records

Information regarding the deed to my home(s) and any mortgages connected to this property may be found at: ______________________

Information regarding liens, taxes, leases, etc., may be found at: ______________________

Loans

Loans I have made to others (status, terms, payments, collateral, etc.):

Survivor Benefits

Potential sources of benefits not named in my will:

Miscellaneous

Locations of cash, receipts, credit union accounts, warranties, and other papers that could have a bearing on the settlement of my estate:

Personal Gifts

My wishes regarding the distribution of personal items such as books, jewelry, keepsakes, etc., not included in my will or living trust:

____

____

Other instructions: ____

Funeral and Burial/Cremation Instructions

My preferred funeral and burial/cremation instructions: ______________________

____

I own cemetery plot # __________ in section # __________ at ______________________

____

The deed to the plot is located at: ____

____

Or:

My cremation plans: ____

____

I have prepaid funeral arrangements with: ______________________ Amount paid: $ ______________

Address: ____

Phone: ____

I have agreed to donate organs to: ____

The signed agreements are located at: ____

Other data pertinent to this record: ____

____

____

____

Charitable Gifts

I would like the following charities to receive gifts:

NAME OF CHARITY	ADDRESS	PHONE	AMOUNT OR % OF ESTATE

Note:

Since the exact amount of your estate's "residue" (defined as the surplus after specific gifts are distributed) cannot be determined at the time you draft your will and/or trust, you may want to distribute the remainder of your estate on a percentage basis.

Alternatively, you may wish to designate certain personal effects, property, or even smaller amounts of cash to individuals or organizations before the balance is divided.

You may also wish to prepare a supplemental list of personal items, which you can keep with a copy of your will and easily update.

Special Information

Should you desire to include a charity in your will, your estate planner may recommend a specific statement, or the following may be used:

> "I give, devise, and bequeath to [insert the name of your charity], headquartered at [insert the full street address of the charity], [insert $ amount of money, percentage of estate, or describe property] [insert "to be used for [specific purpose]" or "to be used for the furtherance of its mission and charitable programs."]"

I would like the above included in my will ❑ Yes ❑ No

The details for including Consumer Reports in your estate plans are on the back cover. For questions, email legacy@consumer.org or call 914-378-2825.

Please use this space for any additional information you wish to give your attorney, explaining any testamentary trusts, or any other desires already expressed. With each bequest, did you consider naming a contingent beneficiary for persons who may predecease you?

The following pages are for any additional information you would like to include.

Organizing your estate plan is an essential exercise. Indeed, it is a great opportunity to ensure that we are satisfied with both the future ownership of assets and the legacy we are creating through those transfers.

If you have questions, or would like to designate Consumer Reports as a beneficiary when you organize your estate plan, Talib Nichiren of our Planned & Major Gifts staff would be happy to speak with you. You may want to ask him about receiving additional planning materials, including Planning Your Charitable Legacy, Tuning Up Your Estate Plan, Giving From Your IRA, Alternative Ways of Giving, and CR's Charitable Gift Annuity Program: Secure Income From a Trusted Partner.

We would like to provide a FREE resource to you, if you have not made a will or an estate plan, at freewill.com/consumerreports. FreeWill has developed an intuitive, online will-writing tool that guides you through creating a fully valid legal will in your jurisdiction or takes you through planning your will before seeing an attorney. This tool is free to you regardless of whether you decide to include a gift to Consumer Reports.

Notes

Notes

Free Resource for Creating a Will

Being prepared is a key principle of Consumer Reports. We believe it is so important to plan and get one's financial affairs in order that we have partnered with FreeWill (freewill.com/consumerreports) so you can create your will online, entirely free of charge.

FreeWill is a secure online tool that will take you through the will preparation process step by step.

If you have a simple estate, you can print your legal will from FreeWill to be signed, witnessed, and notarized.

Your will is one of the most personal and important financial documents in your life. Without a legitimate will, the government—not you—will decide how your affairs and assets are handled. We know thinking about estate planning might not seem like fun. However, many of us are making the choice to be prepared, and we hope you will join us.

If you are creating a will for the first time and you are not using FreeWill, but would like to include Consumer Reports as a beneficiary, you can provide the following language to your attorney or advisor.

"I give and bequeath (the trust shall distribute) to Consumer Reports, Inc., Yonkers, N.Y., the sum of $________________ (or percent of the rest and residue of my estate or trust) to be used by it for its general charitable purposes."

You can also use this language to create a codicil that adds Consumer Reports as a beneficiary to an existing will. You will also want to have our address and Tax ID number on file:

Consumer Reports
Attn: Planned & Major Gifts
101 Truman Avenue
Yonkers, NY 10703
Tax ID #13-1776434

Please note the information provided here is presented solely as general educational material. It is not intended as tax or legal advice. When making a charitable giving plan or estate plan, you should consult your accountant, attorney, or other trusted planning professional.

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Consumer Reports, Inc., is a registered 501(c)(3) nonprofit organization. Our Tax ID is: 13-1776434
101 Truman Avenue, Yonkers, NY 10703 | ConsumerReports.org

Mail Preference Services: Go to CR.org/fundraising if you wish to modify receipt of future mail offers from us.