

## DOCUMENTATION REQUIRED FOR AN ESTATE PLAN

1	COPIES OF ID FOR CLIENT AND SPOUSE	
2	MARGINAL INCOME TAX RATE	
3	DATE OF MARRIAGE	
4	COPY OF ANTENUPTIAL CONTRACT	
5	CHILDREN'S FULL NAMES AND BIRTH DATES	
6	LAST WILL AND TESTAMENT	
7	LIST OF ASSETS AT MARKET VALUE AND LIABILITIES IN PERSONAL CAPACITY OF BOTH CLIENT AND SPOUSE	
8	PURCHASE VALUE OR 2001 VALUATION OF ASSETS FOR CAPITAL GAINS TAX PURPOSES	
9	VALUE OF PERMANENT IMPROVEMENTS MADE TO FIXED PROPERTY (WHERE PROOF OF EXPENSES WERE HELD)	
	<b>THE FOLLOWING IF APPLICABLE:</b>	
10	LATEST POLICY SCHEDULE	
11	LASTEST INVESTMENT SCHEDULE	
12	TRUST DEED (S) AND LATEST LETTER OF AUTHORITY	
13	VALUE OF LOAN ACCOUNTS OWING TO / FROM TRUSTS / BUSINESS	
14	BUY AND SELL AGREEMENTS (S)	
15	PARTNERSHIP AGREEMENT (S)	
16	LATEST EMPLOYEE BENEFIT STATEMENT	
17	FINANCIAL STATEMENTS OF TRUSTS	
18	MARKET VALUE & PERCENTAGE INTEREST OF BUSINESS/ES	
19	LIST OF LIVESTOCK AT MARKET VALUE (IF FARMING CLIENT)	
20	DETAILS OF OFFSHORE ASSETS / JURISDICTION AND COPY OF OFFSHORE WILL	
21	COPY OF DIVORCE ORDER	