

Before Gregory J. Spadea can prepare your will you should fill in the checklist below and bring it to your appointment. If you have any questions please call Mr. Spadea at 610-521-0604.

TOTAL RETIREMENT SAVINGS / INVESTMENTS AND TANGIBLE ASSETS			
RETIREMENT SAVINGS / INVESTMENTS	CURRENT VALUE		
Personal Assets	Husband	Spouse	Joint
Saving Accounts, Checking Accounts, CDs	\$	\$	\$
Taxable Mutual Funds	\$	\$	\$
Annuities (fixed and variable)	\$	\$	\$
IRAs, Rollover IRAs, Roth IRAs	\$	\$	\$
Short-Term Securities (i.e. cash/money markets)	\$	\$	\$
Bonds (i.e. bonds and bond funds)	\$	\$	\$
Stocks (i.e. stocks and stock funds)	\$	\$	\$
Other _____	\$	\$	\$
Employer Sponsored			
401(k)s, 403(b)s, SEPs	\$	\$	\$
Life Insurance	\$	\$	\$
Pension Plans (per year)	\$	\$	\$
Potential Assets			
Inheritance	\$	\$	\$
Real Estate – Primary Residence	\$	\$	\$
Vacation Home/ Time Shares	\$	\$	\$
Rental Properties	\$	\$	\$
TOTAL RETIREMENT SAVINGS / INVESTMENTS AND TANGIBLE ASSETS			

Bring in statements for all the accounts listed above including the deed to all real estate owned.

List all debts including mortgages, student loans and credit cards and include balance due and monthly payment.