ESTATE PLANNING

A GUIDED QUESTIONNAIRE AND ORGANIZER

IOWA STATE SAVINGS BANK

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Estate plans are an important tool to ensure that your loved ones are taken care of after you are gone. A well-organized estate plan makes sure that your assets are distributed according to your wishes, protects your loved ones from financial and legal hardships, and provides peace of mind.

Sometimes, the thought of meeting with estate planning professionals like your attorney, investment advisor, accountant, and local trust officer can seem overwhelming. It can be just as difficult to find time to consider the big questions given the hustle and bustle of your everyday life.

No matter your stage in life, the starting point to an estate plan is to gather all of your financial information and contacts in one place. At Iowa State Savings Bank, we hope that this organizer will help you on your estate planning journey.

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Step 1: Gather your Documents

- Existing wills, trusts, powers of attorney, or similar documents.
- Deeds for all real estate you own.
- Most recent bank and investment accounts statements.
- Identify the location of your safe deposit box and keys.
- Most recent income tax returns.
- Divorce decrees and property settlements with former spouses, if any.
- Prenuptial and post-nuptial agreements, if any.
- Agreements between you and any business entities and associates, including farm leases.
- Descriptive materials on any life insurance policies and employee benefit plans (i.e. pensions, profit sharing, IRA). This includes copies of your beneficiary designations and your most recent statement of accrued benefits.
- Documentation of debts, if any, including mortgages, loan documents, and credit card statements.

Step 2: Personal Information

Individual #1

Last Name: ______________________ First Name: ____________________ Middle: _____________

Other or Former Name(s): ____

Date of Birth: ________________ Place of Birth: __________________ Soc. Sec. No: _____________

Currently Married: ☐ Yes ☐ No Date of Marriage: ______________ Place of Marriage: __________

Mother's Name: ____ Deceased: ☐ Yes ☐ No

Mother's Maiden Name: ____

Father's Name: ____ Deceased: ☐ Yes ☐ No

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________________________ Cell Phone: _________________________

Email: ____

Are you making payments pursuant to a divorce or property settlement: ☐ Yes ☐ No

Are you receiving payments pursuant to a divorce or property settlement: ☐ Yes ☐ No

Do you have a prenuptial agreement: ☐ Yes ☐ No

Do you have a post-nuptial agreement: ☐ Yes ☐ No

Have you ever had a Will or Trust? **Will:** ☐ Yes ☐ No **Trust:** ☐ Yes ☐ No

Are you a U.S. Citizen: ☐ Yes ☐ No Are you a Disabled Veteran: ☐ Yes ☐ No

Any specific health concerns/issues? ____

____

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Individual #2

Spouse / Partner (if Applicable)

Last Name: ______________________ First Name: ____________________ Middle: _____________

Other or Former Name(s): ____

Date of Birth: ________________ Place of Birth: __________________ Soc. Sec. No: _____________

Currently Married: ☐Yes ☐ No Date of Marriage: ______________Place of Marriage: __________

Mother's Name: ____ Deceased: ☐Yes ☐No

Mother's Maiden Name: ____

Father's Name: ____ Deceased: ☐Yes ☐No

Residential Address: ____

Mailing Address: ____

Home Phone: ____________________________________Cell Phone: __________________________

Email: ____

Are you making payments pursuant to a divorce or property settlement: ☐Yes ☐No

Are you receiving payments pursuant to a divorce or property settlement: ☐Yes ☐No

Do you have a prenuptial agreement: ☐Yes ☐No

Do you have a post-nuptial agreement: ☐Yes ☐No

Have you ever had a Will or Trust? **Will:** ☐Yes ☐No **Trust:** ☐Yes ☐No

Are you a U.S. Citizen: ☐Yes ☐No Are you a Disabled Veteran: ☐Yes ☐No

Any specific health concerns/issues? ____

____

Children, Other Family Members, and/or Other Beneficiaries

Full Legal Name	***Date of Birth***	***Relationship***

1: ______________________________ ____________ ________________

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Comments/Notes/Thoughts: ____

____

2: ______________________________ ____________ ________________

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Comments/Notes/Thoughts: ____

____

3: ______________________________ ____________ ________________

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Comments/Notes/Thoughts: ____

____

4: ______________________________ ____________ ________________

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Comments/Notes/Thoughts: ____

____

5: ______________________________ ____________ ________________

Residential Address: ____

Mailing Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Comments/Notes/Thoughts: ____

____

Your Current Professional Advisors

	Name	*Telephone*
Personal Attorney:	________________________________	____________
Accountant:	________________________________	____________
Financial Advisor:	________________________________	____________
Life Insurance Agent:	________________________________	____________
Other Professional(s):	________________________________	____________

Important Questions

(Please select "Yes" or "No" for your answer)	YES	NO
Are you or your spouse receiving social security, disability, VA or other governmental benefits?		
Have you or your spouse been widowed?		
Have you or your spouse ever filed federal or state gift tax returns?		
Are there any charitable organizations that you wish to provide for in your estate plan?		
Are you or your spouse currently the beneficiary of anyone else's trust?		
Do any of your children receive governmental support or benefits?		
Do you provide primary or other major financial support to adult children or others?		

Step 3: Learn How ISSB Can Help

Our dedicated team of experts provide support for your estate planning and wealth management needs. We specialize in serving as a fiduciary, alleviating family conflicts, and bringing resolution to complex matters.

Estate Planning Assistance

- Work with attorneys and their clients to review estate plans
- Explain options, provide guidance, and connect customers with attorneys
- Business succession planning review
- Interpret legal documents and educate customers

Estate & Trust Administration & Conservatorship Management

- Appraise and manage estate assets
- Pay bills and settle outstanding debts
- Handle all details for liquidation of assets
- Selling personal property
- Primary contact for beneficiaries

Step 4: Contact Iowa State Savings Bank

Iowa State Savings Bank will be a great fit to serve as your fiduciary if you check any of the boxes below:

When to Consider ISSB

- ☐ Ag property
- ☐ Business succession
- ☐ Multiple beneficiaries
- ☐ Long-term administration of assets
- ☐ Asset and income growth
- ☐ Out-of-state beneficiary or executor
- ☐ Minor or charitable beneficiaries
- ☐ Non-responsive beneficiary or executor
- ☐ Disabled and special needs beneficiary or executor
- ☐ Incomplete or inaccurate documentation
- ☐ Unique assets
- ☐ Significant tax issues

ISSB Wealth Management Experts

Andrew Zimmerman, JD
Trust Officer &
Internal Counsel

Kim Baker
Trust Officer

Adam Snodgrass
President & CEO

Nick Johnson, CFA
VP & Portfolio Manager

Schedule a Free Consultation

We can help review your financial situation and provide guidance for your next step in the Estate Planning process. Can't make it to the bank? We will come to you. Contact us to schedule your free consultation and discover the benefits of working with Iowa State Savings Bank.

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