



BOYS & GIRLS CLUBS
OF THE MIDLANDS
OMAHA • CARTER LAKE • COUNCIL BLUFFS

Estate Planning

When you know you want to continue furthering the mission of Boys & Girls Clubs of the Midlands, careful planning can allow you to make a meaningful gift, while still meeting personal planning goals for yourself and your family. Your will or trust or other estate planning vehicle is a legal document that should be drafted or amended with the help of your attorney.

Boys & Girls Clubs of the Midlands welcomes the opportunity to work with you and your attorney to create a gift strategy that will fit your situation and achieve your desired impact for you, your family and the Boys & Girls Clubs of the Midlands.

Please use our *Estate Planning Questionnaire* with the help of your attorney. By remembering the Boys & Girls Clubs of the Midlands in your Estate Plan, you will be making a difference in the lives of children for years to come.

Upon completion of the *Estate Planning Questionnaire* or for more assistance, please contact our Chief Development Officer, Laura Schabloske at lschabloske@bgcomaha.org or at (402) 342-1600, ext. 3010.

How to Start
Estate Planning Questionnaire
Background Information

SELF

Name	
Address	
Date of Birth	Social Security #
Home Phone #	Cell Phone #
Email	
Employer	Work Phone #
CPA Name	
Citizenship	
Safe Deposit Box Location	
Names on Box	

SPOUSE/PARTNER

Name	
Address	
Date of Birth	Social Security #
Home Phone #	Cell Phone #
Email	
Employer	Work Phone #
CPA Name	
Citizenship	
Safe Deposit Box Location	
Names on Box	

CHILDREN

Name(s)
Relationship(s)
Address(es)
Birthdate(s)
Phone Number(s)
Email(s)

ASSETS

CASH (Checking, Savings, Certificate of Deposits, Etc.)	
Bank	Account Type
Owner(s)	Balance

BROKERAGE ACCOUNTS (not including retirement accounts)	
Brokerage Firm	Owner(s)
Cost Basis	Value

INDIVIDUALLY HELD STOCKS, BONDS & MUTUAL FUNDS	
Entity	Number of Shares
Cost Basis	Owner(s)
Value	

LIFE INSURANCE	
Company	Type of Policy
Policy # Insured	Owner(s)
Beneficiaries	
Cash Surrender Value (if applicable)	Face Value

REAL ESTATE	
Type	Address
Owner(s)	Cost Basis
Market Value	

BUSINESS INTERESTS	
Form	Name & Nature of Business
Cost Basis	
% Ownership	Value

HOUSEHOLD/PERSONAL PROPERTIES	
General Household Items	Owner(s)
Value	

RETIREMENT PLANS, IRAs, ANNUITIES, PENSION, & EMPLOYEE DEATH BENEFITS	
Description	Owner
Beneficiaries	Value

EXPECTED INHERITANCES	
Description	Expected by Self or Spouse
From	Amount

OTHER ASSETS	
Description	Owner(s)
Cost Basis	Value

LIABILITIES	
Description of Property	Name of Lender
Amount	Interest Rate

OTHER DEBTS	
Type	Name of Lender
Amount	Interest Rate

Summary of Assets & Liabilities		
	Assets	\$
	Liabilities	\$
	Net Estate	\$

INCOME INFORMATION	
Self	Spouse

PERSONAL REPRESENTATIVE	
Name of Personal Representative	
Address	Phone Number
Guardian if you have minor children	
Name	
Address	Phone Number

ESTATE DISTRIBUTION	
Personal Property Item	Name of Beneficiary
Phone Number	

BALANCE OF ESTATE
% you wish to go to
Spouse
Individual of Charitable Organizations

QUESTIONS
List any questions you have concerning your estate plan to ask.