

**Terry Balding & Associates**  
515 W. Main Street  
Sun Prairie, WI 53590  
(608) 837-9099 1-800-727-3039  
FAX 608-825-6468  
[tablading@hirep.net](mailto:tablading@hirep.net)

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## **An Estate Check List**

- Market value of the client's home(s) and other real property
- Real estate-related debt, such as mortgages and home equity loans.
- Client's most recent tax return.
- Life insurance information.
- Long-term care and/or disability insurance information
- Will.
- Living trust.
- Business retirement plan information with statements of value.
- Individual Retirement Account (IRA) statements
- All other investments
- Employer's retirement and deferred compensation information, such as a 401(k), 403(b) and pension statements.
- Businesses investments