

Key Advisors to Be Contacted

Estate Planning Attorney

Name: _____

Firm: Horn & Johnsen SC

Address: 8446 Excelsior Drive, Suite 102, Madison, WI 53717

Phone: (608) 829-2525 Email: _____

Accountant/CPA

Name: _____

Firm: _____

Address: _____

Phone: _____ Email: _____

Financial Advisor

Name: _____

Firm: _____

Address: _____

Phone: _____ Email: _____

Life Insurance Agent

Name: _____

Firm: _____

Address: _____

Phone: _____ Email: _____



Property & Casualty Insurance Agent

Name: _____

Firm: _____

Address: _____

Phone: _____ Email: _____

Bank

Name of Bank: _____

Address: _____

Phone: _____ Safe Deposit Box #: _____

Doctor

Name: _____

Clinic: _____

Address: _____

Phone: _____

Health Insurance

Company Name: _____

Policy Number: _____

Name of Agent: _____

Address: _____

Phone: _____ Email: _____



Employer

Company: _____

Address: _____

Phone: _____

Landlord

Company: _____

Address: _____

Phone: _____ Email: _____

Attorney (for matters other than estate planning)

Type of law: _____

Name: _____

Firm: _____

Address: _____

Phone: _____ Email: _____

Religious Membership

Church/Synagogue: _____

Address: _____

Phone: _____

Funeral Director

Funeral Home: _____

Address: _____

Phone: _____



Relatives and Close Friends to Be Contacted

Name: _____

Relationship: _____

Address: _____

Phone: _____ Email: _____

Name: _____

Relationship: _____

Address: _____

Phone: _____ Email: _____

Name: _____

Relationship: _____

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