



# You and Your Estate: Asset and Financial Assessment

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Here at the Aga Khan Foundation USA, we believe that planning for the future is essential, and we understand the importance of ensuring a financially secure future for those you care about. This estate planning toolkit can help you begin thinking about how you want to plan for the future. We encourage you to think about how you want your estate to be managed and how you want your assets to be distributed. When writing your estate plan, your legal and financial advisors will have a lot of questions. This toolkit is designed to help you think through those questions.

We have provided this planning guide for your benefit. Feel free to take the time to review the different sections. Most of this information you will know or have readily available. Please remember that this toolkit does not legally stand as your will; it is simply a way for you to account for all that you have earned over your lifetime. Be sure to share this guide with your legal advisors, as well as your family.



## YOU AND YOUR FAMILY

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YOUR FULL LEGAL NAME

DATE OF BIRTH

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

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PERSONAL EMAIL ADDRESS

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EMPLOYER

JOB TITLE

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WORK CONTACT NUMBER

WORK EMAIL ADDRESS

MALE  FEMALE

MARRIED  SINGLE  DIVORCED  
 WIDOWED  LEGALLY SEPERATED

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GENDER (PLEASE SELECT ONE)

PRESENT MARITAL STATUS (PLEASE SELECT ONE)

### CHECK WHICH DOCUMENTS YOU CURRENTLY HAVE:

Will  Living Will  Trust  Living Trust

Durable Power of Attorney (Health)  Durable Power of Attorney (Finances)

Other (Please Specify): \_\_\_\_\_



## YOUR SPOUSE'S INFORMATION

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SPOUSE'S FULL LEGAL NAME

DATE OF BIRTH

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

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PERSONAL EMAIL ADDRESS

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EMPLOYER

JOB TITLE

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WORK CONTACT NUMBER

WORK EMAIL ADDRESS

MALE     FEMALE

MARRIED    SINGLE    DIVORCED  
 WIDOWED    LEGALLY SEPERATED

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GENDER (PLEASE SELECT ONE)

PRESENT MARITAL STATUS (PLEASE SELECT ONE)

### CHECK WHICH DOCUMENTS YOUR SPOUSE CURRENTLY HAS:

Will    Living Will    Trust    Living Trust

Durable Power of Attorney (Health)    Durable Power of Attorney (Finances)

Other (Please Specify): \_\_\_\_\_

Do you or your spouse have a prenuptial agreement that identifies and disposes of properties separately?

(If yes, be sure to provide a copy of documentation to your attorney).    Yes    No

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## YOUR CHILDREN'S INFORMATION

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CHILD'S FULL  
LEGAL NAME

DATE OF BIRTH

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SOCIAL SECURITY NUMBER

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MALE     FEMALE

MARRIED    SINGLE    DEPENDENT  
 NEEDS SPECIAL CARE

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GENDER

PRESENT MARITAL STATUS

## ORIGIN OF CHILD

PRESENT MARRIAGE    PRIOR MARRIAGE OR RELATIONSHIP    ADOPTED    DECEASED



### ADDITIONAL CHILD'S INFORMATION

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CHILD'S FULL  
LEGAL NAME

DATE OF BIRTH

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SOCIAL SECURITY NUMBER

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MALE     FEMALE

MARRIED    SINGLE    DEPENDENT  
 NEEDS SPECIAL CARE

---

GENDER

PRESENT MARITAL STATUS

### ORIGIN OF CHILD

PRESENT MARRIAGE    PRIOR MARRIAGE OR RELATIONSHIP    ADOPTED    DECEASED



# You and Your Executor

An executor is the person legally designated to manage your estate and see your intentions through. Your executor carries out how you intend your estate to be distributed, so you should select a trusted individual who understands your circumstances and intentions fully. An executor tends to complete eight separate processes to ensure the proper distribution and transfer of your property and assets to the designated individuals/or parties:

- Submit your will to the probate court
- Locate your heirs
- Determine your estate assets and values
- Pay bills and the estate attorney
- Make debt payments
- Resolve any estate controversies
- File your income and estate tax returns
- Distribute your assets to heirs

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EXECUTOR'S LEGAL NAME

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SECONDARY CONTACT  
NUMBER

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EMAIL ADDRESS

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RELATIONSHIP, IF NOT SPOUSE

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# Your Power of Attorney – Medical

A Power of Attorney for Personal Care is a written document in which you give someone the power to make decisions about your personal care should you become unable to make these decisions yourself. Personal care can include your health care, medical treatment, diet, housing, clothing, hygiene, and safety. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

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FULL LEGAL NAME

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HOME ADDRESS

CITY, STATE, ZIP CODE

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PRIMARY CONTACT NUMBER

SECONDARY CONTACT  
NUMBER

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EMAIL ADDRESS

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RELATIONSHIP, IF NOT SPOUSE

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# Your Power of Attorney - Finance

A Power of Attorney for Finance is a written document in which you give someone the power to make decisions about your property and finances if you become unable to make these decisions yourself. For example, your Attorney for Property could be responsible for taking care of your banking matters, managing your investments, running your business, buying and selling real estate on your behalf, or paying your monthly bills. The only thing that you could not appoint an attorney to do is to write your Will. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

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FULL LEGAL NAME

---

HOME ADDRESS

CITY, STATE, ZIP CODE

---

PRIMARY CONTACT NUMBER

SECONDARY CONTACT  
NUMBER

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EMAIL ADDRESS

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RELATIONSHIP, IF NOT SPOUSE

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### YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

<b>REAL ESTATE/PROPERTIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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MAIN RESIDENCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS

APPROXIMATE VALUE

<b>REAL ESTATE/PROPERTIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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SECONDARY RESIDENCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS

APPROXIMATE VALUE

<b>REAL ESTATE/PROPERTIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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VACATION HOME		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS

APPROXIMATE VALUE

If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>CHECKING ACCOUNT</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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CHECKING ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
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<b>CHECKING ACCOUNT</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
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<b>CHECKING ACCOUNT</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
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If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>SAVINGS ACCOUNT</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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CHECKING ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>SAVINGS ACCOUNTS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>SAVINGS ACCOUNT</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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BANK & ACCOUNT NUMBER	APPROXIMATE VALUE			
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If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>INVESTMENTS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
BONDS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER

APPROXIMATE VALUE

<b>INVESTMENTS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
STOCKS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER

APPROXIMATE VALUE

<b>INVESTMENTS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER

APPROXIMATE VALUE

If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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HOUSEHOLD FURNITURE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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DESCRIPTION	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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TOOLS/EQUIPMENT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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DESCRIPTION	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ANITQUES/COLLECTIONS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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DESCRIPTION	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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JEWELRY		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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DESCRIPTION	APPROXIMATE VALUE
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**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
AUTOMOBILES/VEHICLES		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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DESCRIPTION	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
BUSINESS INTERESTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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DESCRIPTION	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
PERSONAL LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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CUSTODIAN & POLICY NUMBER	APPROXIMATE VALUE
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<b>VALUABLE ASSETS</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
EMPLOYER LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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CUSTODIAN & POLICY NUMBER	APPROXIMATE VALUE
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**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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PRIMARY MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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SECOND MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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VACATION MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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AUTOMOBILE/VEHICLE DEBTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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**YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT**

<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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CREDIT CARD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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ADDITIONAL CREDIT CARD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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INSTALLMENT CONTRACTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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<b>LIABILITIES</b>	<b>CHECK IF:</b>	<b>JOINT PROPERTY</b>	<b>YOUR PROPERTY</b>	<b>SPOUSES PROPERTY</b>
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LOANS ON LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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CUSTODIAN & POLICY NUMBER	APPROXIMATE VALUE			
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# Leaving Your Legacy

As you begin planning your legacy, we hope you will support the work of the Aga Khan Foundation USA. Meaningful change takes time, which is why we've been working in communities across Africa and Asia for decades—and will be there for generations to come. AKF's continued growth and success will require generous support from those who believe in the work we do.

By making a Planned and Legacy (PLG) gift to the Foundation, you help ensure that AKF and its sister agencies across the Aga Khan Development Network will continue improving quality of life for communities worldwide.

The best way to actualize your charitable intentions should be discussed with your attorney or financial advisor. Contact the Foundation when you are ready to develop a plan that includes AKF USA. Our staff will work with you, in confidence, to help you explore and achieve your personal, financial and charitable intentions.

You have an opportunity to make a difference.

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## DISCLOSURE ON ATTORNEYS AND FINANCIAL ADVISORS AND THE AGA KHAN FOUNDATION USA

*Thank you for taking the time to complete this estate and gift planning workbook. Every person's estate plan is specific to them and their family. The Planned and Legacy Giving (PLG) staff at the Aga Khan Foundation will work with you to help you plan for the future. However, we are unable to offer any specific legal or financial advice for your personal situation. Your personal legal and financial advisors are best suited to help you develop your estate plan and should be contacted independently from the Foundation. Working with your attorney and financial advisor will help you develop a personalized estate plan to best fulfill your intentions and wishes.*