

Checklist for a joint testament respectively inheritance contract

This checklist shall facilitate for both you and us the information flow with a view to effectively prepare the appointment respectively the preparation of a draft of the notarial deed. Even if you fill out the checklist only partially this will be a valuable aim for an efficient discussion and the drafting of the deed following thereafter. Please print the checklist for your files and fill it out to the extent possible. In case of questions or comments we are at your disposal by telephone, e-mail or via telefax. Alternatively you can send us the filled out checklist by mail, fax or just bring it along to the appointment.

This checklist can of course not substitute for a personal meeting, but can only be a preparation aid for a discussion.

Personal facts	Decedent 1	Decedent 2
First and family name		
Maiden name		
Date of birth		
Place of birth		
Birth register number		
Nationality		
Goods stand	<input type="checkbox"/> bachelor <input type="checkbox"/> divorced <input type="checkbox"/> widower <input type="checkbox"/> married	<input type="checkbox"/> bachelor <input type="checkbox"/> divorced <input type="checkbox"/> widower <input type="checkbox"/> married
Street / Streetnumber		
Postal code / City		
Phone / mobil		

	c)	
Children of only one spouse (also illegitimate and adopted children)	a)	a)
(First name, family name, date of birth)	b)	b)

Facts to property	Decedent 1	Decedent 2
Real estate in Germany (land, flats, heritable building rights)	<input type="checkbox"/> yes, in _____ Land register of _____ File _____ Market value _____ <input type="checkbox"/> no If yes, is the real estate held via a civil law partnership? <input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes, in _____ Land register of _____ File _____ Market value _____ <input type="checkbox"/> no If yes, is the real estate held via a civil law partnership? <input type="checkbox"/> yes <input type="checkbox"/> no
Real estate abroad	<input type="checkbox"/> yes, in _____ Land register of _____ File _____ Market value _____ <input type="checkbox"/> no If yes, is the real estate held via a civil law partnership (e.g. foreign corporation)? <input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes, in _____ Land register of _____ File _____ Market value _____ <input type="checkbox"/> no If yes, is the real estate held via a civil law partnership (e.g. foreign corporation)? <input type="checkbox"/> yes <input type="checkbox"/> no
Shareholdings in Germany or abroad	<input type="checkbox"/> yes, participation in	<input type="checkbox"/> yes, participation in

	_____ with ____ % If so, please send us a copy of the shareholder agreement <input type="checkbox"/> no	_____ with ____ % If so, please send us a copy of the shareholder agreement <input type="checkbox"/> no
Any life insurances?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
Any claim to pensions?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
Estimated total value of assets (= market value of real estate, shareholdings, bank deposits, securities, household items, cars, precious metal, art, jewelry ect.)	€ _____	€ _____
Liabilities (bank credits, installment credits)?	€ _____	€ _____
„Separate bank accounts“ or joint accounts? If the latter, who has disposition power, i.e. each spouse separately or only together?		

General objectives	
Who shall inherit the material assets after the death of the first spouse?	
First name, family name	
Date of birth	

Street, House number, postal code and city	
Who shall inherit the material assets after the death of the surviving spouse?	
First name, family name	
Date of birth	
Street, House number, postal code and city	
Any other persons to receive specific assets?	
Declaration of the asset	
First name, family name	
Date of birth	
Street, House number, postal code and city	
Any other person to receive the right to use of specific assets?	
Declaration of the asset	
First name, family name	
Date of birth	
Street, House number, postal code and city	
Shall a guardian be appointed to minor children?	

First name, family name	
Date of birth	
Street, House number, postal code and city	
Shall an executor be appointed?	
First name, family name	
Duties of the executor	
Duration of the executorship	
Compensation for the executor	
Shall in any case be prevented that particular individuals become assets.(e.g. previous spouses with whom the testator has common children)?	
<input type="checkbox"/> yes, in concrete _____ <input type="checkbox"/> no	
May the surviving testator have the right to change the terms of the testament alone?	
<input type="checkbox"/> no <input type="checkbox"/> yes <input type="checkbox"/> only different distribution under the children	
Other requests?	