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 notorial 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		
	☐ bachelor	☐ bachelor
Goods stand	☐ divorced	☐ divorced
Goods stand	□ widower	□ widower
	☐ married	☐ married
Street / Streetnumber		
Postal code / City		
Phone / mobil		

E-Mail		
Goods stand	☐ married without marriage contract (Zugewinngemeinschaft)	☐ married without marriage contract (Zugewinngemeinschaft)
	☐ goods seperation	☐ goods separation
	☐ community goods	☐ community goods
Are there already any testaments or hereditary contracts?		
If so, please send us a copy		
Any transfers within the last 10 years by way of anticipated heir (e.g. gifts to children?)	□ yes	□ yes
	□ по	□ по
Have any precautionary or general powers of attorney effective post mortum been issued?	□ yes	□ yes
	□ no	□ no
Is the testator on average less than 183 days per year in Germany?	□ yes	□ yes
	□ no	□ no
Any intention to move your residence abroad in the near future?	□ yes	□ yes
	по	□ no
Did the testator have its residence or habitual residence abroad in the last 10 years?	□ yes	□ yes
	□ no	□ no

Children	Decendent 1	Decendent 2
Common children	a)	
(First name, family name, date of birth)		
	b)	

	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	Decendent 1	Decendent 2
Real estate in Germany (land, flats, heritable building rights)	☐ yes, in	□ yes, in
	Land register of	Land register of
	File	File
	Market value	Market value
	□ no	□ no
	If yes, is the real estate held via a civil law partnership?	If yes, is the real estate held via a civil law partnership?
	□ yes □ no	□ yes □ no
Real estate abroad	□ yes, in	☐ yes, in
	Land register of	Land register of
	File	File
	Market value	Market value
	□ no	□ no
	If yes, is the real estate held via a civil law partnership (e.g. foreign corporation)?	If yes, is the real estate held via a civil law partnership (e.g. foreign corporation)?
	□ yes □ no	□ yes □ no
Shareholdings in Germany or abroad	☐ yes, participation in	☐ yes, participation in

	with%	with%
	If so, please send us a copy of the shareholder agreement □ no	If so, please send us a copy of the shareholder agreement □ no
Any life insurances?	□ yes	□ yes □ no
Any claim to pensions?	□ yes □ no	□ yes
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 seperately 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 particula spouses with whom the testator has common		
☐ yes, in concrete		
□ no		
May the surviving testator have the right to change the terms of the testament alone?		
□ по		
□ yes		
□ only different distribution under the children		
Other requests?		