SOUTH DAKOTA

ANNUAL FINANCIAL CHECK UP

PACKAGE

Control Number: SD-P075-PKG

U.S. Legal Forms™ thanks you for your purchase of an Annual Financial Check Up Package. This package is a useful and necessary tool to help you annually review your financial status and maintain your financial records.

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I. FORM LIST

With your Annual Financial Check Up Package, you will find the essential forms to annually evaluate your finances and revise your financial documents based upon any changes in your personal circumstances.

Included in your package are the following forms:

1. Last Will and Testament that suits your specific needs
2. General Durable Power of Attorney for Property and Finances Effective Upon Disability
3. Estate Planning Questionnaire and Worksheets
4. Retirement Cash Flow
5. Personal Monthly Budget Worksheet
6. Cash Flow Statement
7. Credit Report Request Form
8. Financial Statement Form for Husband and Wife
9. Financial Statement Form for Individual

II. DESCRIPTIONS OF FORMS

Brief descriptions of the forms contained in your U.S. Legal Forms™ Annual Financial Check Up Package are found below.

Last Will and Testament - This state-specific form details in writing your wishes regarding who is to receive your property at death and who will administer your estate. It also enables you to appoint trustees or guardians, if applicable.

General Durable Power of Attorney for Property and Finances Effective Upon Disability- This state-specific form allows you to appoint an attorney-in-fact (agent) to make decisions regarding property, finances, business, banking, management and other matters for you. It is effective only upon your disability, incompetency or incapacity.

Estate Planning Questionnaire and Worksheets - This state-specific form is used for estate planning purposes and contains personal and financial information, including details regarding your home and other property you own and additional assets including investments, life insurance policies and individual retirement accounts.

Retirement Cash Flow- This multi-state form allows retired persons to determine their available funds for savings and investments for themselves and a spouse based upon itemized retirement income, taxes, and living expenses.

Personal Monthly Budget Worksheet- This multi-state form allows you to enter amounts into itemized categories for income and expenses in order to plan and organize your financial affairs. It will calculate monthly totals for income and expenses, as well as any money remaining after all expenses are paid.

Cash Flow Statement- This multi-state form is used for budgeting purposes to show incoming and outgoing income and expenses of a typical household.

Credit Report Request Form- This multi-state form allows an individual to request his or her annual free credit report allowed by federal law from each of the credit bureaus through the Annual Credit Report Request Service, which is the centralized source for consumers to request this annual credit report.

Financial Statement Form for Husband and Wife- This multi-state form is a statement of assets and liabilities of a husband and wife using joint finances. The form contains sections to identify current assets, current liabilities, deferred assets, and net worth.

Financial Statement Form for Individual- This multi-state form is a statement of assets and liabilities of an individual. The form contains sections which ask the individual to identify current assets, current liabilities, deferred assets, and net worth.

If you need additional information, please visit www.uslegalforms.com and look up forms by subject matter. You may also wish to visit our legal definitions page at http://definitions.uslegal.com/

III. TIPS ON COMPLETING THE FORMS

The form(s) in this packet may contain “form fields” created using Microsoft Word or Adobe Acrobat (“.pdf” format). “Form fields” facilitate completion of the forms using your computer. They do not limit your ability to print the form “in blank” and complete with a typewriter or by hand.

It is also helpful to be able to see the location of the form fields. Go to the View menu, click on Toolbars, and then select Forms. This will open the Forms toolbar. Look for the button on the Forms toolbar that resembles a shaded letter “a”. Click this button and the form fields will be visible.

By clicking on the appropriate form field, you will be able to enter the needed information. In some instances, the form field and the line will disappear after information is entered. In other cases, it will not. The form was created to function in this manner.

IV. DISCLAIMER

These materials were developed by U.S. Legal Forms, Inc. based upon statutes and forms for the subject state. All information and Forms are subject to this Disclaimer:

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