

ESTATE PLANNING INFORMATION

Today's Date: _____

A. Personal Information

1. Full name(s): _____

2. List any other name(s) by which you (or your spouse) have been known:

3. Mailing Address: _____

Telephone #: Home: _____ Cell: _____

4. Date(s) of birth: _____

5. Social Security #(s): _____

6. Children:

Name

Address

Date of Birth

a. _____

b. _____

c. _____

d. _____

7. Do you (or your spouse) have any children with special needs? ___ Yes ___ No

Name(s): _____

8. Your Employer: _____

Position/Title: _____ Years there: _____

9. Spouse's Employer: _____

Position/Title: _____ Years there: _____

10. Has either of you been married before? ___ Yes ___ No

a. If yes, when and to whom: _____

b. List all children of that marriage: _____

c. What are the custody arrangements for those children?

11. Are you required to pay spousal support or child support? ___ Yes ___ No

12. Have you (or your spouse) ever served in the military? ___ Yes ___ No
If yes, please give branch, date of discharge and Serial #:

13. Of what country or countries are you and your spouse citizens?

B.

Assets

Value

Home	_____
Vacation Home/Camp	_____
Other Real Estate	_____
_____	_____
Checking Acct	_____
Savings Acct	_____
CDs	_____
Mutual Funds	_____
Securities	_____
Cash Value Life Insurance	_____
Annuities	_____
IRAs	_____
Retirement/ Pensions	_____
Furniture	_____
Cars, Trucks	_____
Boats, RVs	_____
Jewelry	_____
Collectibles/Antiques	_____
Other:	_____
_____	_____

TOTAL ASSETS:

C. **Debts**

Home Mortgage:	_____
Other Mortgages:	_____
Auto Loans:	_____
Credit Cards/Other:	_____

TOTAL DEBTS:

Are any of your debts insured? ___ Yes ___ No

If yes, which ones? _____

14. If you (or your spouse) are involved in a closely-held business:

a. Name of business: _____

b. Proprietorship ____ Partnership ____ Corporation ____

c. What is your (or your spouse's) interest worth? _____

d. If any other members of your family are involved in the business, please list them:

15. Have you (or your spouse) established any trusts? ____Yes ____No

16. Are you (or your spouse) a beneficiary or trustee of a trust established by someone else?
____Yes ____No

17. Who are your first and second choices to serve as your executor(s) or personal representative(s)?

a. _____

b. _____

18. Who are your first and second choices to serve as guardian for any minor or disabled children?

a. _____

b. _____

19. Who are your first and second choices to serve as trustee for property being left to a minor or disabled child?

a. _____

b. _____

20. Is there anything else you think we should know in planning your estate(s)?
____Yes ____No If yes, please explain:

Please attach copies of the following:

- Deeds for any real estate you or your spouse now own.
- Current wills and trusts, if any, including trusts created by you and trusts in which you are named as beneficiary.
- Prenuptial agreement between you and your current spouse.
- Divorce judgment or child support order under which you are obligated to pay.

- Organizational documents, including buy-sell agreements, for any businesses in which you have an ownership interest.
- Life insurance policies, including beneficiary designations.
- Gift tax returns that you have filed.

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