

ESTATE PLANNING INFORMATION

1. Full legal name:

2. Other names I use or have used:

3. Date of Birth _____ I am a citizen of _____

4. Home Address:

Home Phone: _____

Cell Phone: _____

E-mail : _____

5. My Employer _____

6. Business Address _____

7. Spouse's full legal name: _____

8. Other names my spouse uses or has used: _____

9. Date of Birth _____ My spouse is a citizen of _____

10. Spouse's Employer _____

11. Business Address _____

12. Full legal names and addresses of children _____ Birth dates _____

A. _____

B. _____

C. _____

D. _____

13. Were you previously married? ____ Yes ____ No Your spouse? ____ Yes ____ No

14. Were any of the children born of a prior marriage? ____ Yes ____ No

15. Have you and your spouse resided in any of the following estates while married: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Oklahoma, Oregon, Texas, Washington?

____ Yes ____ No If "yes", please circle the state, indicate the years you resided there.

16. Special family needs, such as health problems, physical or mental handicaps, requirement to support parents, spendthrift tendencies, etc, which you desire to take into account?

17. Do you have a will? ____ Yes ____ No Your spouse? ____ Yes ____ No
If "yes", please provide a copy of and any codicils thereto.

18. Are you the creator, trustee or beneficiary of any trust? ____ Yes ____ No
Your spouse? ____ Yes ____ No If "yes", please provide a copy.

19. Have you and your spouse executed a pre-marital or post-marital agreement? ____ Yes ____ No
If "yes", please provide a copy.

20. Have you filed prior gift tax returns? ____ Yes ____ No Your spouse? ____ Yes ____ No
If "yes", please provide a copy of your return.

<u>Asset Type</u>	<u>Type of Ownership</u> (Insert estimated values)		
	<u>You</u>	<u>Joint Tenancy</u>	<u>Spouse</u>
A. Cash: (checking, savings, C.D.'s, money market)			
1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
B. Accounts and Notes Receivable:			
1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____
C. Public Stock, Mutuels, Bonds:			

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____

D. Retirement Accounts:

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____

<u>You</u>	<u>Joint Tenancy</u>	<u>Spouse</u>
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E. Investment Accounts:

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____

F. Life Insurance:(show death benefit)

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____

G. Real Estate:

1. _____	\$ _____	\$ _____	\$ _____
Mortgage Balance	(_____)	(_____)	(_____)
2. _____	_____	_____	_____
Mortgage Balance	_____	_____	_____
3. _____	_____	_____	_____
Mortgage Balance	(_____)	(_____)	(_____)

H. Possible Inheritance:

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____

I. Closely Held Stock:

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____
<u>You</u>	<u>Joint Tenancy</u>	<u>Spouse</u>	

J. Partnership Interests:

1. _____	\$ _____	\$ _____	\$ _____
General _____ or Limited _____	% Ownership		
2. _____	_____	_____	_____
General _____ or Limited _____	% Ownership		

K. Other Property:
(include if significant value)

1. _____	\$ _____	\$ _____	\$ _____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
TOTALS	\$ _____	\$ _____	\$ _____

Checklist of Items to Bring with You

1. Items checked yes in questions 17-20.
2. Copies of latest statements for bank accounts, retirement accounts and investment accounts.
3. Life insurance policies or certificates.
4. Copies of Deeds to real property.
5. Stock certificates.
6. Partnership agreement