

CLIENT INFORMATION FOR ESTATE PLANNING

Today's Date: _____ Referred by: _____

Please briefly describe the nature of your estate planning goals and/or concerns: _____

Name: _____

Address: _____ County: _____

City: _____ State: _____ ZIP: _____

Phone Numbers: Home _____ Cell _____

E-Mail Address for private communications: _____

SS#: _____ Date of Birth: _____

Employer: _____

Annual Gross Income (please list all amount(s) and source(s)): _____

Marital Status: Single Married Cohabiting Divorced Widowed

If applicable, please list the other adults residing with you his/her relationship to you and his/her date of birth:

If applicable, please list the following about each of your children:

Name	Age & Sex	Marital Status & Name of Spouse	Number of Children (your grandchildren)
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If applicable, please list the following about each of your grandchildren:

Name	Age & Sex	Parent(s) of Child (your children)
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Please list and rank the person(s) you would like to administer your estate (i.e. your executor/personal representative)

Name	Address & County of Residence	Relationship to You
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If applicable, Please list and rank the person(s) you would like to have custody of your minor children

Name	Address & County of Residence	Relationship to You
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ESTATE INFORMATION

Real Estate (this includes your residence, if owned, and any other parcels you own either individually or jointly):

Description of the parcel	Present Value	Purchase Price	Mortgage Balance
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If any of the parcels listed above are owned jointly with another individual, please explain and list other owners:

Partnership Interests:

Name	Percentage You Hold	Value of Partnership
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Closely Held Corporation Interests:

Name	S/C Corp.	Number of Shares	Percentage of Stock Value Per Share
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Stocks and Bonds:

Name	Approximate Total Value	Held Individually or Jointly
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If any of the stocks/bonds listed above are owned jointly, please give the name(s) of other owners:

Bank Accounts:

Bank/Lending Institution	Type of Account	Held Individually or Jointly
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If any of the stocks/bonds listed above are owned jointly, please give the name(s) of other owners:

If you are expecting an inheritance, please explain and give an approximation of the amount you will inherit: _____

Retirement Benefits:

	Present Value	Beneficiary
Keogh Plan: _____		
401(k) Plan: _____		
403(b) Plan: _____		
Pension: _____		
Profit Sharing: _____		
IRA: _____		
Roth IRA Account: _____		
Special Death Benefit: _____		

Life Insurance:

Insurance Co.	Term or Whole	Face Value of Policy	Policy Owner	Beneficiary

Annuities:

Company Name	Current Value	Basis	Annuitant	Beneficiary

Personal Property:

	Approximate Value	Description
Household Goods: _____		
Furniture: _____		
Automobile(s): _____		
Recreational Vehicles: _____		
Tools: _____		
Jewelry: _____		
Collections: _____		
Antiques: _____		
Other: _____		

If you would like to designate specific personal property to certain individuals, please describe: _____
