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**ESTATE PLANNING INFORMATION**

*Today's Date:* \_\_\_\_\_

*Please complete separate sheet for each person*

**A. Personal Information**

1. Full legal name: \_\_\_\_\_

2. List any other name(s) by which you are also known:

\_\_\_\_\_

3. Physical address: \_\_\_\_\_

Mailing address (if different): \_\_\_\_\_

Email address: \_\_\_\_\_

Telephone #: Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

4. Date of birth: \_\_\_\_\_

5. Social Security #: \_\_\_\_\_

6. Children:

Name

Address

Date of Birth

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

7. Do you have any children with special needs? \_\_\_ Yes \_\_\_ No

Name(s) of children with special needs: \_\_\_\_\_

8. Your Employer: \_\_\_\_\_

Position/Title: \_\_\_\_\_ Years there: \_\_\_\_\_

9. Have 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 ever served in the military? \_\_\_ Yes \_\_\_ No

If yes, please give branch, date of discharge and Serial #:

13. Of what country are you a citizen?

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 assets:

\_\_\_\_\_

**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. Are you involved in a business? If so, please provide the following information for **each business**:

a. Name of business: \_\_\_\_\_

b. How is the business structured? D/B/A, partnership, LLC, corporation?

\_\_\_\_\_

c. What is the value of your share? \_\_\_\_\_

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

\_\_\_\_\_

e. Are there any restrictions on your ability to transfer your ownership in the business to anyone else? If so, please describe: \_\_\_\_\_

15. Have you established any trusts? \_\_\_ Yes \_\_\_ No

If yes, please attach copies of any trust agreements, including details about what is currently held in trust.

16. Are you a beneficiary or trustee of a trust established by someone else? \_\_\_ Yes \_\_\_ No

If yes, please attach a copy.

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

a. \_\_\_\_\_

b. \_\_\_\_\_

18. Who are your first and second choices to serve as guardian for any minor or disabled children? (name, address, telephone number)

- a. \_\_\_\_\_
- b. \_\_\_\_\_

19. Who are your first and second choices to serve as trustee for any property to be held in trust for the benefit of a minor or disabled beneficiary? (name, address, telephone number)

- a. \_\_\_\_\_
- b. \_\_\_\_\_

19. How do you want your estate divided after your death? Please attach separate sheet if necessary.

20. If any of your beneficiaries predecease you, what should happen to their share of your estate?

21. If you want us to prepare a durable financial power of attorney, who do you want to name as your agent to handle your finances? (name, address, telephone number)

Who is your second choice for handling your finances if your agent is unable or unwilling to serve? (name, address, telephone number)

22. Do you want us to prepare an advance healthcare directive? If so, who do you want to name as your agent to make medical decisions for you? (name, address, telephone number, email address if available)

If that person is unable or unwilling to serve, who is your second choice (name, address, telephone number, email address if available)?

23. Is there anything else you think we should know to plan your estate? (please attach additional pages if needed)

*Please attach copies of the following:*

- Deeds for any real estate you and/or your spouse now own, including any property held in trust, owned by LLC or other entity in which you have an interest
- Current wills and trusts, if any. Please include copies of trusts created by you and trusts in which you are named as beneficiary.
- Prenuptial or postnuptial agreement between you and your current spouse.
- Divorce judgment(s) or child support order(s) that you are obligated to pay.
- Organizational documents, including bylaws and operating agreements, for any businesses in which you have an ownership interest.
- Life insurance policies, including beneficiary designations.
- Any gift tax returns that you have filed.