

DATE _____ REFERRED BY _____

NAME _____ BIRTHDATE _____

SPOUSE _____ BIRTHDATE _____

HOME ADDRESS _____

CITY _____ STATE _____ ZIP _____

HOME TELEPHONE () _____

WORK PLACE-HIS _____

ADDRESS _____

WORK TELEPHONE () _____

WORK PLACE-HER _____

ADDRESS _____

WORK TELEPHONE () _____

SOCIAL SECURITY #: YOU _____ SPOUSE _____

MARITAL STATUS: MARRIED SINGLE WIDOW(ER) DIVORCED

LEGALLY SEPARATED

UNITED STATES CITIZEN: YOU: YES NO; SPOUSE YES NO

ESTATE PLANNING DATA SHEET

CLIENT(S) _____ FILE # _____

PLEASE BRING TO THE FIRST CONFERENCE AS MANY OF THE FOLLOWING DOCUMENTS AS ARE APPLICABLE TO YOU (check those which apply):

Existing Wills or Trust Agreements;

Life Insurance Policies;

Divorce Decrees and Property Settlement Agreements;

Deeds and Lease Agreements for Real Estate;

Employee Benefit and Retirement Plans;

Corporation Documents and Shareholder Agreements;

Partnership Agreements;

Deeds of Trust and Notes for Money Owed to You;

Last Year's Income Tax Returns;

Gift Tax Returns;

Any Other Information That Might Be Important.

I. CHILDREN: (indicate if adopted)

1. NAME _____ BIRTHDATE _____

CHILD'S SPOUSE _____ MINOR CHILDREN? YES NO

CITY AND STATE _____

2. NAME _____ BIRTHDATE _____

CHILD'S SPOUSE _____ MINOR CHILDREN? YES NO

CITY AND STATE _____

3. NAME _____ BIRTHDATE _____

CHILD'S SPOUSE _____ MINOR CHILDREN? YES NO

CITY AND STATE _____

4. NAME _____ BIRTHDATE _____

CHILD'S SPOUSE _____ MINOR CHILDREN? YES NO

CITY AND STATE _____

5. OTHER (use separate sheet)

H. DEBTS, MORTGAGES AND LIENS Current Value

Debts Owed _____

Mortgages on Property _____

Bank Loans _____

Insurance Policy Loans _____

Installment Contracts _____

Contingent Liabilities (guaranty, indemnity _____

agreements)

I. APPROXIMATE ANNUAL INCOME Amount

Salary _____

Fees _____

Commissions _____

Interests _____

Dividends _____

Pensions _____

Annuities _____

Royalties _____

Trust Income _____

Payments receivable on mortgages, _____

installment sales, etc.

TOTAL _____

J. FUTURE INHERITANCES

Do you, your spouse or your children expect to inherit property? From whom? Estimated amount?

SUMMARY

ASSETS CURRENT VALUE

1. Real Estate _____

2. Closely-held corp. stock _____

3. Listed securities _____

4. Cash _____

5. Mortgages and promissory notes _____

6. Life insurance includible in estate _____

7. Jointly-owned property (value includible in estate) _____

8. 50% of value of property owned jointly with spouse _____

9. Miscellaneous property interests _____

10. General power of appointment _____

11. Annuities, death benefits _____

12. Gift tax paid on gifts within last 3 years _____

TOTAL: _____

LIABILITIES

1. Mortgages payable

2. Bank loans

3. Insurance policy loans

4. Debts, etc.

TOTAL: _____

NET CURRENT ESTATE: _____