

CLIENT INFORMATION

	CLIENT #1	CLIENT #2
Legal name		
Address		
Telephone Home		
Telephone Cell		
Telephone Business		
Email		
Date of Birth		
Place of Birth & Citizenship		
Social Security Number		
Marriage - pre-nuptial agreement? Prior marriages? Please explain and provide copies of documents		

CHILDREN

Name	Address	SS# and Date of Birth

Please list **GRANDCHILDREN** and indicate which child of yours is their parent.
Do any have special needs?

Name	Address	SS# and Date of Birth

FINANCIAL DETAILS

ASSETS	JOINT	CLIENT #1	CLIENT #2
Personal Property (<i>art, jewelry, etc.</i>)	\$	\$	\$
Cash & Notes (<i>provide copies of account statements</i>)			
Real Estate (<i>include deeds and mortgage information</i>)			
Securities (<i>include stocks held in certificate form and copies of brokerage statements</i>)			
Partnerships & LLCs (<i>provide copies of certificates of formation, agreements, and list assets held by entity</i>)			
Life Insurance (<i>provide details of insured life, beneficiary designations, cash and face values, and death benefits; any life insurance trusts?</i>)			
Qualified Assets - Retirement (<i>provide statements for each account, as well as beneficiary designations</i>)			
Other			
TOTAL	\$	\$	\$

MISCELLANEOUS

1. Please provide copies of any and all estate planning documents, including Wills, Trusts, Powers of Attorney, Etc.
2. Please provide a list of primary and secondary choices for fiduciary roles, such as executor, trustee, attorney-in-fact (POA agent), and health care proxy representative.
3. Please give some thought to whether you wish to benefit one or more charitable institutions and/or individuals in your Will, or a disposition in the event that there is a complete failure of your descendants prior to the final distribution of your estate.
4. Please indicate if your children listed on page 1 are from a current or prior marriage.
5. Please provide copies of any Federal Gift Tax Returns that have been filed on your behalf.
6. Please provide copies of any and all life insurance policies and/or annuity contracts.
7. Please provide copies of any and all real estate deeds.
8. If a spouse has predeceased you, please provide copies of the death certificate and any other estate-related paperwork, including Last Will and Testament, Letters Testamentary, and Estate Tax Return.
9. If divorced, please provide copies of divorce or separation agreements, as well as judgements or orders.
10. Do you expect to receive an inheritance in the near future? If so, please provide details.
11. Please provide a list of debts, mortgages and/or other liabilities.
12. Referred By: