





Husband's parents (if living):

Name

Address

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Spouse/Partner's parents (if living):

Name

Address

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**II. Individual Beneficiaries to be Named in Will – (other than immediate family):**

Name

Address

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**III. Other Personal Data**

A. Do you have a Will? \_\_\_\_\_

If so, what is its date and where is it kept? \_\_\_\_\_

B. 1. Do you have a prenuptial agreement? \_\_\_\_\_  
(If so, please provide us with a copy.)

2. Have either of you been divorced or separated? \_\_\_\_\_  
(If so, please provide us with a copy of any separation agreement or divorce decree.)

3. Are there any children of a former marriage not shown above? \_\_\_\_\_

C. Do you have a safe deposit box? \_\_\_\_\_

If so, where is it located? \_\_\_\_\_

Name of any other person with access to box: \_\_\_\_\_

D. Have either of you ever lived in a community property jurisdiction? (e.g., California, Louisiana, Arizona, Texas) \_\_\_\_\_

E. Are either of you a beneficiary of any trust (whether income, principal or holder of a power of appointment)? \_\_\_\_\_

F. Are either of you a trustee of any trust? \_\_\_\_\_

(If so, please provide us with a copy of the will or trust agreement.)

**IV. Financial Data:**

<u>Real Property</u>	<u>Present Value</u>	<u>Mortgage, if any</u>	<u>Owned by *</u>
1. _____			
2. _____			
3. _____			
4. _____			

B. Do you have any personal property of significant value (e.g., airplane, jewelry, art, coin collection)? \_\_\_\_\_

<u>Personal Property</u>	<u>Present Value</u>	<u>Owned by *</u>
_____		
_____		
_____		
_____		
_____		

(C) Cash or Cash Equivalents

Checking accounts:

Present Value

Owned by \*

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Savings accounts/certificates of deposit:

Present Value

Owned By \*

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Other cash equivalents (e.g. Treasury bonds or bills, etc.):

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- D. Do you own mutual funds or stocks or bonds traded on a U.S. exchange? \_\_\_\_\_.  
If so, please provide details or attach a schedule.

Stock

Value

Owned by\*

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- E. Do you own other investments (other than in a closely-held or family business) which are not liquid (e.g., limited partnership interests, unlisted stock, etc.)? \_\_\_\_\_.  
If so please provide details.

Asset

Value

Owned by\*

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F. Closely-held or Family Business Interests owned:

<u>Name</u>	<u>Business Form</u> <u>(corporation, partnership, etc.)</u>	<u>Present Value</u>	<u>Owned by*</u>
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Are there any purchase or restrictive agreements relating to any of these business interests? \_\_\_\_\_ .

(If so, please provide us with copies.)

G. Do either of you have employee benefits? \_\_\_\_\_ If so, does either of you have:

	<u>Owner *</u>	<u>Present Value</u>	<u>Beneficiary</u>
1. Pension rights?	<hr/>		
	<hr/>		
2. Stock options?	<hr/>		
	<hr/>		
3. 401(k) Plan?	<hr/>		
	<hr/>		
4. IRA?	<hr/>		
	<hr/>		

H. Do either of you have life insurance? \_\_\_\_\_

<u>Name of Company</u>	<u>Insured *</u>	<u>Owner *</u>	<u>Face Value</u>	<u>Beneficiary</u>
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I. Do either of you have an anticipated inheritance? \_\_\_\_\_ If so please provide details. \_\_\_\_\_

J. Do either of you have any substantial debts or liabilities (other than mortgages secured by real estate described above)? \_\_\_\_\_ If so:

Name of Creditor	<u>Principal Amount</u>	<u>Secured? - by what?</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

K. Have either of you made any gifts to an individual of property worth more than \$10,000.00? (If so please provide details). \_\_\_\_\_

L. Have either of you ever filed a gift tax return? \_\_\_\_\_  
(If so, please provide us with copies.)

M. Do either of you have any other significant property interests that we should know about (e.g., copyrights, patents, mortgages, annuities, expectancies from family, oil and gas properties, etc.)? \_\_\_\_\_

If so, please provide details:

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**V. Names, relationships and addresses of persons whom you would want to act on your behalf:**

1. Personal Representative (Executor) \_\_\_\_\_

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2. Trustee of any Trust \_\_\_\_\_

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3. Guardian(s) for minor children \_\_\_\_\_

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4. General Durable Power of Attorney \_\_\_\_\_

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5. Medical Power of Attorney \_\_\_\_\_

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**PLEASE BRING TO YOUR INITIAL ESTATE PLANNING MEETING:**

- Current wills, if any;
- Trusts which you have created, if any;
- Trusts of which you are or may be a beneficiary;
- Copies of deeds to real property (for title purposes);

- Life Insurance policies;
- Employee Benefit Plan Descriptions;
- Any partnership agreements, business buy-sell agreements and employment contracts;
- Pre or Post-Nuptial Agreements and Divorce Decrees/Property Settlements;
- Information concerning any funeral or burial arrangements you have made or wish to make.