Please assist me in learning about your particular estate planning needs and fill out this questionnaire as completely las possible. If you have questions about a particular item, please circle it and we can discuss it further at your appointment. Please bring this completed form with you to our appointment.

Name:		DOB:		SSN:
Spouse Name:		DOB:		SSN;
Address:				
Telephone: Home/Work/Cell				
Employer/occupation			Annual Salary:	
Spouse employer/occupation			Annual Salary:	
Children:				
Name:	DOB:		Address:	
Name:	DOB:		Address:	
Name:	DOB:		Address:	
Name:	DOB:		Address:	
Name:	DOB:		Address:	

Are any of the above children from a prior marriage/relationship? If so, what is the name of the other parent?

Name:

## Grandchildren:

Name:	DOB:	Parents:
Name:	DOB:	Parents:

## ASSETS:

Bank:		Account Type:	Bal:
	How is it titled:		
Bank:		Account Type:	Bal:
	How is it titled:		
Bank:		Account Type:	Bal:
	How is it titled:		
Stocks/E	Bonds/Investment		
Name:		Value:	How is it titled:
Name:		Value:	How is it titled:
Name:		Value:	How is it titled:
Real Est	ate		
Address	::		Value:
Mortga	ge balance:	Bank:	How is it titled:
Address	::		Value:
Mortga	ge balance:	Bank:	How is it titled:
Address	::		Value:
Mortga	ge balance:	Bank:	How is it titled:
Do you l	have an ownership in a	business:	Name of Business:
Sole pro	oprietorship, LLC, LLP, S	Corp:	
State of	Incorporation/Organiza	ation:	Nature of your vested interest?
Descript	tion of business:		

Life Insurance

Company:	Universal/Term:	Named Insured:
Beneficiary:	Owner of Policy:	Face Value:
Company:	Universal/Term:	Named Insured:
Beneficiary:	Owner of Policy:	Face Value:
Company:	Universal/Term:	Named Insured:
Beneficiary:	Owner of Policy:	Face Value:

Annuities:

Company:	Value:	Beneficiary:
Company:	Value:	Beneficiary:

Pension/Retirement benefits:	
Туре:	Owner:
Current Value:	
Туре:	Owner:
Current Value:	
Туре:	Owner:
Current Value:	

OTHER PROPERTY:	
Automobile:	Value:
Automobile:	Value:
Automobile:	Value:
Furniture:	Value:
Art collection:	Value:
Jewelry:	Value:
Guns:	Value:
Safe Deposit Box:	Value:

## DEBTS: Apart from Mortgage already listed.

Туре:	Amount:	Payments:
In whose name:		
Туре:	Amount:	Payments:
In whose name:		
Туре:	Amount:	Payments:
In whose name:		
Туре:	Amount:	Payments:
In whose name:		
Туре:	Amount:	Payments:
In whose name:		