

**ESTATE PLANNING
Client Information**

Name(s): _____

Address: _____

Home #: _____

Work #: _____
Person 1

Person 2

Cell #: _____
Person 1

Person 2

E-mail: _____ @ _____

_____ @ _____

DOB: _____
Person 1

Person 2

SSN: _____
Person 1

Person 2

Children Information

Name: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

(DOB) (SSN)

Name: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

(DOB) (SSN)

Name: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

(DOB) (SSN)

If you have more children, please use a separate page for their information.

If you are single, you will need to name at least one agent for health care and one agent for financial matters. If there are 2 of you, your spouse or partner will be primary agent. You will need to name at least one alternate agent for health care and one for financial matters. These agents and alternates can be the same people or you can select different people. If you know whom you want to select, please fill in the information below. If you don't know, please give this some thought and we can discuss it at our first meeting. Given names and not nicknames please.

Health Care Agent/Alternate for Person 1

Name and relationship to you: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

Health Care Agent/Alternate for Person 2

Name and relationship: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

Financial Agent/Alternate for Person 1

Name and relationship: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

Financial Agent/Alternate for Person 2

Name and relationship: _____

Address: _____

Home #: _____ Work #: _____ Cell #: _____

Guardian. If you have children under age 18, you will need to appoint a guardian if you (or your child's other parent) cannot act as guardian. If you know whom you will appoint, please tell us:

Name, relationship, city and state of residence: _____

Trustee. If you will be creating a trust to administer assets after your death (or the death of both of you), you will need a trustee - a person to be in charge of administering and distributing the assets. Think about who would be an appropriate person, and a back up to that person. If you know, please tell us:

Name, relationship, city and state of residence: _____

ASSET INFORMATION

Please make a list of all your assets, with this information for each:

What is it? A retirement account like an IRA or 401K? Investments purchased with outside your retirement account? Real estate?

How is it titled? Is it just in your name? Joint with you spouse/partner/family member? In an existing revocable trust? If you have any question about how it is titled, please bring an account or asset statement.

What is its approximate current value? You can round off to the nearest thousand dollars.

If it is life insurance, what is the death benefit? For most estate planning purposes, it is the death benefit and not the cash value that is the important number.

What are your debts? Other than credit cards paid off monthly, what obligations do you have such as loans or mortgage obligations?