Estate Planning Client Information Record (Married Couple)

CONFIDENTIAL PERSONAL INFORMATION FOR ESTATE PLANNING

Date ______________________________________

Individual	*Husband*	*Wife*
Name	___________________	___________________
Also known as	___________________	___________________
Social Security number	___________________	___________________
Birth date	___________________	___________________
U.S. citizen	_______ Y _______ N	_______ Y _______ N
Living parents	___________________	___________________
Former spouse	___________________	___________________
Business address	___________________	___________________
Telephone number	___________________	___________________
Fax number	___________________	___________________
E-mail address	___________________	___________________
Home address	____	
County of residence	____	
Date of marriage	____	

Children

Living children (indicate children from prior marriages and adopted children)

Name	*Birth date*	*Social Security number*	*No. of children*
___________________	_______	___________________	_______________
___________________	_______	___________________	_______________
___________________	_______	___________________	_______________
___________________	_______	___________________	_______________
___________________	_______	___________________	_______________
___________________	_______	___________________	_______________

Deceased children ____

Living children of deceased children ______________________________________

Note: If there are no living children or grandchildren, list the brothers and sisters (living and deceased) of the husband and the wife.

Agents and brokers

Safe-deposit box	_____ Y	_____ N	Location _______________________
Accountant	_____ Y	_____ N	Name _________________________
Insurance agent	_____ Y	_____ N	Name _________________________
Stockbroker	_____ Y	_____ N	Name _________________________

CONFIDENTIAL PROPERTY INFORMATION
FOR ESTATE PLANNING
Date ____________________________________

Real estate (including land contracts)

Description (include owner: husband, wife, joint)	*Mortgage balance*	*Market value*
____________________________________	$ _____________	$ ___________
____________________________________	$ _____________	$ ___________
____________________________________	$ _____________	$ ___________
____________________________________	$ _____________	$ ___________

Cash (checking, savings, CD, money market, credit union)

Location of account (include owner: H, W, J)	*Amount*
____	$ ___________
____	$ ___________
____	$ ___________
____	$ ___________

Stocks and bonds (if in a brokerage account, list firm name)
Listed securities (H) ____
Listed securities (W) ____
Listed securities (J) ____
Closely held (family) securities ____

Life insurance (include insured, insurance company, insurance type, owner, and beneficiary)	*Face amount*
____	$ __________
____	$ __________
____	$ __________
____	$ __________

Retirement benefits (list company) _______________________________________
IRA (list location, type [Roth, non-Roth], and amount) __________________________
____

Miscellaneous
Household furnishings, autos, collections ___________________________________
Money owed by others to you ____
Miscellaneous (trusts, etc.) ____
Expected inheritances ____
List all gifts made by you over $3,000 in value (date and beneficiary) _____________
____
Any gift tax return filed ____ Y ____ N Years filed ____________________________
List significant debts or obligations other than mortgages listed above ____________
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