

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**ESTATE PLANNING INFORMATION FORM (INDIVIDUAL)**

Full Legal Name: \_\_\_\_\_ (\_\_\_\_/\_\_\_\_/\_\_\_\_)  
Birth Date

Are you a U.S. citizen? YES \_\_\_\_\_ NO \_\_\_\_\_

Are you: Single \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed \_\_\_\_\_

If widowed, please list the name of your spouse and his/her date of death:

\_\_\_\_\_

Your Occupation (or, if retired, your former occupation)

\_\_\_\_\_

Home Address: \_\_\_\_\_ County \_\_\_\_\_

\_\_\_\_\_

Phone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Email \_\_\_\_\_

**PERSONAL INFORMATION**

Full Name of Children & Address	Birthdate and Age	Marital Status	# of Children
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

Do any of your children or grandchildren require special attention? (Consider, for example, their education, mental or physical needs) Yes \_\_\_\_\_ No \_\_\_\_\_

Does any family member receive Social Security or other benefits? Yes \_\_\_ No \_\_\_

Do you presently have a Living Trust? Yes \_\_\_ No \_\_\_

Have you ever filed a Gift Tax Return? Yes \_\_\_ No \_\_\_

**LIST OF ASSETS**

(Description of the Asset)

(Fair Market Value)

**Real Property: (Address)**

_____	\$ _____
_____	_____
_____	_____
_____	_____

**Checking, Savings, Certificates of Deposit, and Other Cash Accounts:**

_____	\$ _____
_____	_____
_____	_____
_____	_____

**Mutual Funds/Money Market Accounts:**

_____	\$ _____
_____	_____
_____	_____

**Stocks or Bonds:**

_____	\$ _____
_____	_____
_____	_____

**Valuable Personal Property:**

_____	\$ _____
_____	_____
_____	_____

**LIFE INSURANCE**

Insurance Company	Insured	Policy Owner	Beneficiary	Death Benefit
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**RETIREMENT BENEFITS/OTHER**

**401(k)/Pension/Profit Sharing**

Beneficiary

Value

_____	_____	_____
_____	_____	_____
_____	_____	_____

**IRA's**

Beneficiary

Value

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Other Assets** (Including partnership or business interests)

Value

_____	_____
_____	_____
_____	_____

**Future Inheritance**

Are you anticipating any inheritance in the next 5 – 10 years? If yes, please estimate the approximate amount \$ \_\_\_\_\_

**LIST OF LIABILITIES**

**Home Mortgage:**

\$ \_\_\_\_\_

**Notes:**

\_\_\_\_\_

**Loans Against Life Insurance**

\_\_\_\_\_

**Other Obligations**

\_\_\_\_\_

Please list the names and addresses of any Key Advisors:

**CPA:**

\_\_\_\_\_

**Personal Bank & Banker**

\_\_\_\_\_

**Financial Advisor**

\_\_\_\_\_

**Life Insurance Agent**

\_\_\_\_\_

\_\_\_\_\_