Date ____/____/____

ESTATE PLANNING INFORMATION FORM (MARRIED COUPLE)

Husband: Full Legal Name: ______________________________ (____/____/____)
Birth Date

Wife: Full Legal Name: ______________________________ (____/____/____)
Birth Date

Are you a U.S. citizen? (Circle One) Husband: Y N Wife: Y N

Date of Marriage: ____/____/____ Any prior marriages? Husband: Y / N Wife: Y / N

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

Home Address: ____________________________________ County________________________
____

Phone: (Home) _________________(Work) _________________ (Cell)___________________

Email____

PERSONAL INFORMATION

Full Name of Children	Birth Date 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_____

Did you and your spouse ever sign a pre or post marriage contract? ______

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)	**Joint Owned**	**Husband**	**Wife**
______________________	$ ____________	$ ____________	$____________
______________________	____________	____________	____________
______________________	____________	____________	____________
______________________	____________	____________	____________

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)	Joint/Husband/Wife	Value
_________________________________	_________________	$__________
_________________________________	_________________	__________

Future Inheritance

Are you anticipating any inheritance in the next 5 – 10 years? If yes, please estimate the approximate amount: Husband $_________________ Wife $____________________

LIST OF LIABILITIES

	Husband	Wife	Joint
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 ____
____