



ESTATE PLANNING INFORMATION

1. Husband _____ Date of Birth _____ Social Security # _____
2. Wife _____
3. Address: _____
4. Home Phone _____ Work Phone _____
- Cell Phone _____ E-Mail _____

5. Information About Your Children (Living and Deceased):

<u>Name</u>	<u>Date of Birth</u>	<u>Marital Status</u>	<u>Name of Spouse</u>	<u>Number of Children</u>
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Child 1: _____

Address: _____

Home Phone: _____ Work/Cell Phone: _____

Child 2: _____

Address: _____

Home Phone: _____ Work/Cell Phone: _____

Child 3: _____

Address: _____

Home Phone: _____ Work/Cell Phone: _____

Child 4: _____

Address: _____

Home Phone: _____ Work/Cell Phone: _____

*Are any of the above children from a prior marriage? _____

CONCERNS: (YES/NO)

- ☐ Are you concerned about probate expenses?
- ☐ Are you concerned about Federal Estate Taxes?
- ☐ Will your family be provided for upon your death?
- ☐ Are you saving enough money for retirement?
- ☐ Are you going to provide some/all of your child or grandchild's college funding?
- ☐ Do you wish to maximize the amount left to your family?
- ☐ Are any of your beneficiaries disabled?
- ☐ Are you interested in tax deferred accumulation?
- ☐ Are you concerned about nursing home costs?
- ☐ Do you have any other concerns that you would like to discuss?

HOW BIG IS YOUR ESTATE?

Checking	\$ _____
Savings	\$ _____
Money Market	\$ _____
Certificates of Deposit	\$ _____
Husband – IRA/Retirement/Annuity	\$ _____
Wife - IRA/Retirement/Annuity	\$ _____
Stocks/Bonds	\$ _____
Automobiles	\$ _____
Real Estate – Home	\$ _____
Real Estate – Other	\$ _____
Husband – Life Insurance	\$ _____
Wife – Life Insurance	\$ _____
Land Contracts	\$ _____
Household Goods/Personal Items	\$ _____
Other _____	\$ _____
Other _____	\$ _____
Other _____	\$ _____
Other _____	\$ _____
GROSS ESTATE	\$ _____