



**CONFIDENTIAL ESTATE PLANNING
DATA FORM**

*The information on this form will be treated as confidential,
subject to the attorney-client privilege.*

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FAMILY INFORMATION

	HUSBAND	WIFE
Full Legal Name		
Citizenship		
Social Security Number		
Home Address (Street)		
City, State and Zip		
Home Phone Number		
Cell Phone Number		
Email Address		
Fax Number		
Employer		
Business Address (Street)		
City, State and Zip		
Business Phone Number		
Birth date		
Date of Marriage		
Estimated Size of Potential Inheritance (<i>i.e. what you expect to receive from others</i>)		
Who referred you to us?		

(Use your mouse to proceed to next table)

YOUR CHILDREN

Full Legal Names	Birth date	Child Only of Husband (H) or Wife (W)	Married (Y/N)	Number of children

OTHER QUESTIONS TO ANSWER BEFORE FIRST MEETING

1. How much is your net estate worth (<i>include face value of life insurance policies, amounts within retirement plans and IRA's, etc.</i>)?	\$																														
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%; padding: 5px;">First Choice</th> <th style="width: 33%; padding: 5px;">Second Choice</th> <th style="width: 33%; padding: 5px;">Third Choice</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">2. Who should administer your estate (<i>as the "Executor" or "Personal Representative"</i>)?</td> <td style="padding: 5px;"></td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">3. Who should be the trustee of the trust or trusts (<i>for surviving spouse, children, etc.</i>) created under your wills?</td> <td style="padding: 5px;"></td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">4. If both parents die, with whom should your minor children live (<i>as "Guardian"</i>)?</td> <td style="padding: 5px;"></td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">5. Who should manage your financial affairs if you become incapacitated (<i>as "financial attorney-in-fact"</i>)?</td> <td style="padding: 5px; text-align: center;">Husband</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;">Wife</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">6. Who should make health care decisions on your behalf if you become incapacitated (<i>as "health care attorney-in-fact"</i>)?</td> <td style="padding: 5px; text-align: center;">Husband</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;">Wife</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">7. At what age (or ages) should your children receive their inheritance outright?</td> <td colspan="2" style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">8. Who are listed as the beneficiary of your life insurance policies and retirement plan assets?</td> <td colspan="2" style="padding: 5px;"></td> </tr> </tbody> </table>	First Choice	Second Choice	Third Choice	2. Who should administer your estate (<i>as the "Executor" or "Personal Representative"</i>)?			3. Who should be the trustee of the trust or trusts (<i>for surviving spouse, children, etc.</i>) created under your wills?			4. If both parents die, with whom should your minor children live (<i>as "Guardian"</i>)?			5. Who should manage your financial affairs if you become incapacitated (<i>as "financial attorney-in-fact"</i>)?	Husband			Wife		6. Who should make health care decisions on your behalf if you become incapacitated (<i>as "health care attorney-in-fact"</i>)?	Husband			Wife		7. At what age (or ages) should your children receive their inheritance outright?			8. Who are listed as the beneficiary of your life insurance policies and retirement plan assets?		
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NAMES OF CHARITABLE ORGANIZATIONS

Please list names of charitable organizations that you may be interested in including in your estate planning, if any.

