



**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

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

*(Use your mouse to proceed to next table)*

## YOUR CHILDREN

Full Legal Names	Birth date	Married (Y/N)	Number of children

