

Date: _____

Approximate Estate Value: \$ _____

HOW DID YOU HEAR ABOUT THE FIRM? _____

ESTATE PLANNING FACT FINDER

Married Single Divorced Widowed

Legal Name: _____ DOB _____ SSN# _____

Legal Name: _____ DOB _____ SSN# _____

Home Phone _____ Cell Phone _____ E-mail Address _____

Spouse Cell Phone _____ Spouse E-mail Address _____

Mailing Address _____ Street Address _____

County _____ Occupation (H) _____ (W) _____

Health Concerns _____

Date of this Marriage: _____

Prior marriages: Yes No

Children of Prior marriages: Yes No

Independent Counsel: Yes No

Children of this Marriage

Birth date

City & State

Marital Status

of Children

_____ / ____ / ____ _____ Yes No _____

_____ / ____ / ____ _____ Yes No _____

_____ / ____ / ____ _____ Yes No _____

_____ / ____ / ____ _____ Yes No _____

_____ / ____ / ____ _____ Yes No _____

_____ / ____ / ____ _____ Yes No _____

Children of Prior Marriages

Birth date

City & State

Marital Status

of Children

H/W _____ / ____ / ____ _____ Yes No _____

H/W _____ / ____ / ____ _____ Yes No _____

H/W _____ / ____ / ____ _____ Yes No _____

H/W _____ / ____ / ____ _____ Yes No _____

H/W _____ / ____ / ____ _____ Yes No _____

Disinherit Children _____

Handicapped Children _____

| REAL ESTATE | \$Current Value | \$Mortgage | Owner | Copy of recorded deed? Yes / No |
|---------------------------|-----------------|------------|-------|------------------------------------|
| Primary Residence | | | | |
| 2 nd Residence | | | | |
| Other | | | | |

| RETIREMENT – IRAs, 401ks, Pensions, Annuities | | | | |
|---|---------|----------|-------|-------------|
| Type (i.e. 401k) | Company | \$ Value | Owner | Beneficiary |
| | | | | |
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| | | | | |
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| | | | | |
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| | | | | |

| NON- RETIREMENT – Checking, Savings, CD, Brokerage, LLC, S-Corps, Stocks, Bonds | | | | |
|---|--------------|----------|-------|-------------|
| Type | Bank/Company | \$ Value | Owner | Beneficiary |
| | | | | |
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| | | | | |

| LIFE INSURANCE | \$Death Benefit | \$Cash Value | \$Premium | Owner | Beneficiary |
|----------------|-----------------|--------------|-----------|-------|-------------|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |

EXPECTED INHERITANCES

Husband: _____

Wife: _____

Approximate Estate Value: \$ _____