



# Information Sheet (Please Print)

Full Legal Name (First, Middle, Last, Suffix) Birth Date (Mon. Day, Yr) Age

Print your signature, the way you legally sign documents Social Security Number

Occupation

Marital Status: \_\_\_\_\_ Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced Date of Marriage # of Years

If Married, Spouse's Full Legal Name (First, Middle, Last, Suffix) Birth Date (Mon. Day, Yr) Age

Print your signature, the way you legally sign documents Social Security Number

Occupation

Home Address (Street, City, State, Zip) County

Phone Number(s) Cell: ( )

Home: ( ) Work: ( ) Cell: ( )

Email:

Email:

List the Full Name(s) of All of Your Children: Child(ren)'s Name (Living and Deceased): M/F Birth Date # of Kids Marital Status (M/S/D)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are all of the above US Citizens? If no, indicate who is not: \_\_\_\_\_

Do any of your children or grandchildren require special attention re: educational, mental or physical needs?

Yes / No

If yes, list name(s): \_\_\_\_\_

Have you and your spouse ever sign a pre or post marriage contract? \_\_\_\_\_

Are there any persons other than minor children who are dependent upon you? \_\_\_\_\_

Does any family member receive social security or others benefits? \_\_\_\_\_

Do you presently qualify for veteran disability exemptions? \_\_\_\_\_

Do you presently have a Living Trust? \_\_\_\_\_

Have you ever filed a Federal Gift Tax Return? \_\_\_\_\_

**ASSETS**

Real Property Address:

Client

Spouse

Joint

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

Automobiles Year and Make

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

Savings and Checking Accounts

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

Certificates of Deposit

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$

# Information Sheet

(Please Print)

Qualified Plans (IRAs, 402(k)s, 403(b)s, Roth

Beneficiary

Value

_____	_____	_____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Mutual Funds/Money Market Accounts

Client

Spouse

Joint

_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

Stocks and/or Bonds

_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

Valuable Personal Property (art, boat, coin collection, etc.)

_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

Other Miscellaneous Contents (Total Value)

\$ _____	\$ _____	\$ _____
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Insurance Company- Insured

Policy Owner

Beneficiary

Death Benefit

_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

# Information Sheet (Please Print)

Other Assets	Client/Spouse/Joint	Value
_____	_____	_____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Are you or your spouse anticipating any inheritance within the next 5-10 years? YES / NO

If ~~Yes~~, estimate the anticipated amount: \_\_\_\_\_

Certain Trust language is available for specific religious affiliations or preferences. If you would like to see this language and perhaps include it in your trust, please indicate your religious affiliation.

\_\_\_\_\_

How active are you in the practice of your faith?

Very       Somewhat       Not Very

## LIABILITIES

	Client/Spouse/Joint	Value
Home Mortgage	_____	\$ _____
Notes	_____	\$ _____
Loans on Life Insurance	_____	\$ _____
Other Obligations	_____	\$ _____

## KEY ADVISORS

CPA

\_\_\_\_\_

BANKER

\_\_\_\_\_

\_\_\_\_\_

FINANCIAL ADVISOR

(If you do not have a financial advisor, please indicate that)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Insurance Agent(s):

\_\_\_\_\_

\_\_\_\_\_