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Client Full Legal Name: _____

Prior names/or AKA: _____

Mailing Address: _____

Email address: _____

Home Phone: _____ Cell: _____

Birth Date: _____ SSN: _____

Currently Married?: Yes No

Spouse Name: _____

Spouse Birthdate: _____ SSN: _____

Child #1 Name: _____

Address: _____

Telephone: _____

Birthdate: _____ Son Daughter

Is this a Joint child with current spouse? Yes No

Child #2 Name: _____

Address: _____

Telephone: _____

Birthdate: _____ Son Daughter

Is this a Joint child with current spouse? Yes No

Child #3 Name: _____
Address: _____
Telephone: _____
Birthdate: _____ Son Daughter
Is this a Joint child with current spouse? Yes No

Child #4 Name: _____
Address: _____
Telephone: _____
Birthdate: _____ Son Daughter
Is this a Joint child with current spouse? Yes No

Where you previously married? Yes No

Prior Spouse Name: _____

Names of children you had with prior spouse:

Property Owned

Real estate owned #1 Address: _____

Estimated value: _____

What kind of property is this?: _____

Who else owns this with you? _____

Real estate owned #2 Address: _____

Estimated value: _____

What kind of property is this?: _____

Who else owns this with you? _____

Real estate owned #3 Address: _____

Estimated value: _____

What kind of property is this?: _____

Who else owns this with you? _____

Automobiles #1 Make: _____ Model: _____

Est. Value: _____ Vin: _____

Name(s) on title? _____

Automobiles #2 Make: _____ Model: _____

Est. Value: _____ Vin: _____

Name(s) on title? _____

Automobiles #3 Make: _____ Model: _____

Est. Value: _____ Vin: _____

Name(s) on title? _____

Automobiles #4 Make: _____ Model: _____

Est. Value: _____ Vin: _____

Name(s) on title? _____

Boats / RV's / ATV 1) _____

2) _____

3) _____

4) _____

5) _____

Bank Accounts 1

Type of account: _____

What institution/bank: _____

Who's name(s) on act? _____

Estimated Value: _____

Bank Accounts 2

Type of account: _____

What institution/bank: _____

Who's name(s) on act? _____

Estimated Value: _____

Bank Accounts 3
Or Retirement Act.

Type of account: _____

What institution/bank: _____

Who's name(s) on act? _____

Estimated Value: _____

Bank Accounts 4
Or Retirement Act.

Type of account: _____

What institution/bank: _____

Who's name(s) on act? _____

Estimated Value: _____

Bank Accounts 5
Or Retirement Act.

Type of account: _____

What institution/bank: _____

Who's name(s) on act? _____

Estimated Value: _____

Life Insurance:

Company: _____

Covering who?: _____

Value of Insurance: _____

Payable to who? _____

Life Insurance:

Company: _____

Covering who?: _____

Value of Insurance: _____

Payable to who? _____

Business Ownership:

Company: _____

Value of ownership interest: _____

Other Assets

1) _____

Approximate value: _____

2) _____

Approximate value: _____

3) _____

Approximate value: _____

4) _____

Approximate value: _____

5) _____

Approximate value: _____

Income Sources:

Source 1: _____

Amount: _____ What frequency? _____

Source 2: _____

Amount: _____ What frequency? _____

Source 3: _____

Amount: _____ What frequency? _____

Power of Attorney

If you were unable to make a decision for yourself (incapacitated), who would you want to make a decision for you regarding your finances, property and assets?

Name of person to make decisions #1 _____

Address: _____

Relationship to you: _____

Name of person to make decisions #2 _____

Address: _____

Relationship to you: _____

Death considerations

Do you want to cremated? _____

Do you wish to be buried? _____

Where to be buried? _____

Any specific requests regarding your funeral? _____

Specific Gift Requests

Specific Item or money amount	Person to receive this item or money
1) _____	_____
2) _____	_____
3) _____	_____
4) _____	_____
5) _____	_____
6) _____	_____
7) _____	_____
8) _____	_____
9) _____	_____
10) _____	_____

List any thoughts you have regarding who should get what in general when you pass away:

