

ESTATE PLAN ASSETS, LIABILITIES AND INFORMATION FORM

ESTATE ASSETS

	<u>HUSBAND</u>	<u>JOINT*</u>	<u>WIFE</u>
CASE	\$ _____	\$ _____	\$ _____
BONDS (governmental or corporate- so indicate)	_____	_____	_____
STOCKS-MARKETABLE (include options and so indicate)	_____	_____	_____
STOCKS-CLOSE CORPORATION S C Disc Foreign	_____	_____	_____
SOLE PROPRIETORSHIP	_____	_____	_____
PARTNERSHIP INTERESTS (General or Limited and indicate nature – Real estate, Oil & Gas)	_____	_____	_____
QUALIFIED RETIREMENT PLAN BENEFITS (describe and state beneficiary)	_____	_____	_____
IRA (state beneficiary)	_____	_____	_____
NON QUALIFIED ANNUITIES (state beneficiary)	_____	_____	_____
RESIDENCE	_____	_____	_____
REAL ESTATE (describe if out of state and indicate location)	_____	_____	_____
LIFE INSURANCE (if owned by other than insured, so state and state beneficiary of each policy)	_____	_____	_____
OTHER ASSETS (i.e. – Deferred Compensation, Notes Receivable, Collectibles, Antiques, etc.)	_____	_____	_____
TOTAL ASSETS	_____	_____	_____

EXPECTANCIES _____

ESTATE LIABILITIES

MORTGAGE \$ _____

OTHER LIABILITIES _____

TOTAL LIABILITIES _____

* "Joint" means joint with right of survivorship. If property is owned as tenants in common, enter 1/2 value under "husband" and 1/2 under "wife". (Deed must be inspected: if there are no words of rights of survivorship in the deed, property is not "joint").

INFORMATION

NAME _____ AGE _____ BUSINESS _____ PHONE# _____

SPOUSE _____ AGE _____ BUSINESS _____ PHONE# _____

ADDRESS _____

CITY _____ ZIP _____ COUNTY _____ PHONE# _____

CHILDREN

NAMES

DATES OF BIRTH

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Husband U.S. Citizen yes no

Any non U.S. citizen beneficiary yes no

Names: _____

Wife U.S. Citizen yes no

Any Disinherited Beneficiaries yes no

Any Incompetent Beneficiaries yes no

Names: _____

Names: _____

Antenuptial or Premarital Agreement
Agreement yes no

Previous marriages yes no
(attach copy of any separation agreement
or divorce decree)

Existing Estate Planning Documents: yes no
(Wills, Revocable and Irrevocable
Trustee – attach copy of each)

Have you made any large gifts? _____

Do you anticipate receiving any large gifts or inheritances? _____

Who do you want to be your trustee and/or executor? _____

This Questionnaire Does Not Cover Every Possible Issue. It is used as a basis to start our conversation. Many other issues, relevant to your estate plan, will likely be discussed as well. Please ask your attorney any questions you have.