

I. Existing Documents:

Do you have old wills, powers of attorney, living wills or trusts? ___ Yes ___ No

(If so, please bring copies with you.)

Do you have a prenuptial agreement? ___ Yes ___ No

(If so, please bring a copy with you.)

J. Are you the beneficiary of any trusts or do you expect any inheritances? ___ Yes ___ No

(If so, please bring copies of documents with you when possible.)

K. Children or next of kin. Please list all children and all other persons whom you may wish to name as beneficiaries of your estate.

<u>Full Name</u>	<u>Address and Telephone Number</u>	<u>Relationship</u>	<u>Date of Birth</u>	<u>Social Security Number</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

L. Name of CPA: _____ Address: _____ Telephone: _____

M. Name of Broker: _____ Address: _____ Telephone: _____

N. Other Information:

II. ASSET INFORMATION

A. Please list bank accounts and certificates of deposit.

<u>Institution</u>	<u>Owner (H, W, Joint)</u>	<u>Account Number</u>	<u>Approximate Value</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

B. IRAs, 401(k), SEP, Keoghs, Etc.

<u>Custodian/Type of Account</u>	<u>Owner (H, W)</u>	<u>Account Number</u>	<u>Approximate Value</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. Stocks (including stock options), Bonds and Securities. If you have brokerage statements, do not list the securities individually in the statement; merely list the brokerage account.

<u>Number of Shares or Face Value of Bonds</u>	<u>Company</u>	<u>Owner</u>	<u>Approximate Value</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

D. Real Estate:

<u>Address</u>	<u>Owner</u>	<u>Approximate Value</u>

E. Life Insurance Policies and Annuities:

1. Policy Number: _____
Name of Insured: _____
Owner of Policy: _____
Approximate Cash Surrender Value: _____
Face Value of Policy: _____
Amount of Policy Loans: _____
Beneficiary of Policy: _____
2. Policy Number: _____
Name of Insured: _____
Owner of Policy: _____
Approximate Cash Surrender Value: _____
Face Value of Policy: _____
Amount of Policy Loans: _____
Beneficiary of Policy: _____
3. Policy Number: _____
Name of Insured: _____
Owner of Policy: _____
Approximate Cash Surrender Value: _____
Face Value of Policy: _____
Amount of Policy Loans: _____
Beneficiary of Policy: _____
4. Policy Number: _____
Name of Insured: _____
Owner of Policy: _____
Approximate Cash Surrender Value: _____
Face Value of Policy: _____
Amount of Policy Loans: _____
Beneficiary of Policy: _____

F. Personal Property (valued at more than \$5,000.00 per item):

G. Business Assets: Closely Held Corporation Stock, Sole Proprietorships or Partnership Interests. Please be sure to give the name and approximate value of each.

H. List any other assets (not listed in any category above).

I. Liabilities:

1. Mortgage on Home:

Held by: _____
(Name) (Street) (City) (State) (Zip)

Amount Currently Due: _____

2. Other Liabilities:

<u>Owed To</u>	<u>Owed By</u>	<u>Approximate Amount</u>
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