



## ESTATE PLANNING INFORMATION SHEET

DATE: \_\_\_\_\_

FILE NO.: \_\_\_\_\_

**WIFE**

**NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]                      [Initial]                      [Last/Maiden]

**BORN:**

**PLACE:**

**SOCIAL SECURITY NO.:**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
[Date]                      [City]                      [State]

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

**HUSBAND**

**NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]                      [Initial]                      [Last]

**BORN:**

**PLACE:**

**SOCIAL SECURITY NO.:**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
[Date]                      [City]                      [State]

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

**PRESENT MARRIAGE**

**DATE:**

**PLACE:**

**YEARS:**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_  
[Date]                      [City]                      [State]                      [Country]                      [#]

If you were previously married, please attach a copy of your Judgment for Divorce and Property Settlement Agreement.



**PREVIOUS #1:  
MARRIAGES**

**PLACE:**

**YEARS:**

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
[Date]                      \_\_\_\_\_  
[City]                      \_\_\_\_\_  
[State]                      \_\_\_\_\_  
[Country]                      \_\_\_\_\_  
[#]

**NAME OF PREVIOUS SPOUSE:**

**STATUS:**

\_\_\_\_\_  
[First]                      [Initial]                      \_\_\_\_\_  
[Last/Maiden]                      \_\_\_\_\_  
[Ex/Deceased]

**#2:**

**PLACE:**

**YEARS:**

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
[Date]                      \_\_\_\_\_  
[City]                      \_\_\_\_\_  
[State]                      \_\_\_\_\_  
[Country]                      \_\_\_\_\_  
[#]

**NAME OF PREVIOUS SPOUSE:**

**STATUS:**

\_\_\_\_\_  
[First]                      [Initial]                      \_\_\_\_\_  
[Last/Maiden]                      \_\_\_\_\_  
[Ex/Deceased]

**CHILDREN**

**#1 NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]                      [Initial]                      \_\_\_\_\_  
[Last at Birth]                      \_\_\_\_\_  
[Married Name]                      \_\_\_\_\_  
[S.S.#]

**BORN:**

**ADDRESS, IF DIFFERENT:**

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
[Date]                      \_\_\_\_\_  
[# & Street]                      [City]                      \_\_\_\_\_  
[State/Zip]

If not the child of both spouses



**#2 NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]      [Initial]                      [Last at Birth]      [Married Name]                      - -  
[S.S.#]

**BORN:**

**ADDRESS, IF DIFFERENT:**

\_\_\_\_\_  
/ /  
[Date]      [ # & Street]                      [City]                      [State/Zip]

If not the child of both spouses

**#3 NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]      [Initial]                      [Last at Birth]      [Married Name]                      - -  
[S.S.#]

**BORN:**

**ADDRESS, IF DIFFERENT:**

\_\_\_\_\_  
/ /  
[Date]      [ # & Street]                      [City]                      [State/Zip]

If not the child of both spouses

**OTHER POTENTIAL BENEFICIARIES**

**#1 NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]      [Initial]                      [Last]                      - -  
[S.S.#]

**RELATION:**

**ADDRESS:**

\_\_\_\_\_  
[ # & Street]                      [City]                      [State/Zip]

**#2 NAME:**

**PRESENT AGE:**

\_\_\_\_\_  
[First]      [Initial]                      [Last]                      - -  
[S.S.#]

**RELATION:**

**ADDRESS:**

\_\_\_\_\_  
[ # & Street]                      [City]                      [State/Zip]







**SECURITIES**

Please attach copies of your most recent Securities/Stock Account Statements

**#1 STOCK:  
PURCHASED:**

_____	_____	_____	____/____/____
[Qty]	[Name]	[Exchange]	[Date]
\$ _____/Sh.		\$ _____/Tot.	\$ _____/Sh.
[Purchase Price]			[Present Value]

**#2 STOCK:  
PURCHASED:**

_____	_____	_____	____/____/____
[Qty]	[Name]	[Exchange]	[Date]
\$ _____/Sh.		\$ _____/Tot.	\$ _____/Sh.
[Purchase Price]			[Present Value]

**#1 OTHER:  
PURCHASED:**

_____	_____	_____	____/____/____
[Qty]	[Description]		[Date]
\$ _____/SH.		\$ _____/TOT.	\$ _____/SH.
[Purchase Price]			[Present Value]

**#2 OTHER:  
PURCHASED:**

_____	_____	_____	____/____/____
[Qty]	[Description]		[Date]
\$ _____/Sh.		\$ _____/Tot.	\$ _____/Sh.
[Purchase Price]			[Present Value]

**CONTRACTS**

**LIFE INSURANCE POLICIES:**

_____	_____	_____	\$ _____	\$ _____
[Insured]	[Beneficiary]	[Type]	[Amount]	[Prem]
_____	_____	_____	\$ _____	\$ _____
[Insured]	[Beneficiary]	[Type]	[Amount]	[Prem]



**PENSION/PROFIT SHARING:**

_____	_____	_____	\$ _____
[Insured]	[Beneficiary]	[Type]	[Amount]
_____	_____	_____	\$ _____
[Insured]	[Beneficiary]	[Type]	[Amount]

**\*\*\* PLEASE ATTACH COPIES OF ALL POLICIES AND PLANS.**

**PERSONAL JEWELRY:  
PROPERTY**

_____	\$ _____
[Description]	[Value]
_____	\$ _____
[Description]	[Value]
_____	\$ _____
[Description]	[Value]

**FURS:**

_____	\$ _____
[Description]	[Value]
_____	\$ _____
[Description]	[Value]

**COLLECTIONS:**

_____	\$ _____
[Description]	[Value]
_____	\$ _____
[Description]	[Value]

**COMMENTS:** \_\_\_\_\_  
\_\_\_\_\_