

PERSONAL INFORMATION

DATE: _____

FULL LEGAL NAMES (Also list any other names used)

Husband _____
(Full name w/middle initial)

Wife _____
(Full name w/middle initial)

Current Address _____
and Zip Code: _____

County: _____

MOBILE NUMBERS

Husband _____ Wife _____

EMAIL ADDRESSES

Husband _____ Wife _____

DATE OF BIRTH

HOME PHONE NUMBER

Husband _____
Wife _____

SOCIAL SECURITY NUMBER

U.S. CITIZEN

Husband _____
Wife _____

Yes __ No __
Yes __ No __

EMPLOYER

Husband Company Name: _____
Phone No.: _____

Wife Company Name: _____
Phone No.: _____

CURRENT MARRIAGE

Date of Marriage: _____

Have you entered into a Prenuptial or Postnuptial Agreement with your spouse?

- _____ No
- _____ Yes (If “Yes”, please attach copy)

Have you ever resided in a community property state? (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin)

- _____ No
- _____ Yes (If “Yes”, please list states and dates of residency)

PRIOR MARRIAGES

If either of you have been married before, please state the name of your prior spouse, date marriage ended and indicate whether by divorce, annulment or death.

Husband _____

Wife _____

Do you have any obligations under a Divorce Decree (or Separation Agreement)?

- _____ No
- _____ Yes (If “Yes”, please attach copy)

CHILDREN (Please note if children are from previous marriage)

NAME	BIRTH DATE	SOCIAL SECURITY NUMBER	ADDRESS (if different from yours)

If you have any deceased children, list their names and date of death, and any of their children who survived them.

GUARDIANS (A guardian is someone who would have the care and custody of your minor children.)

First Preference Name _____
 Address _____

 Relationship: _____

Second Preference Name _____
 Address _____

 Relationship: _____

LIVING PARENTS (Include complete names and addresses)

Husband Name _____
 Address _____

Wife Name _____
 Address _____

POSSIBILITIES FOR INHERITANCE (Give source and amount)

Husband _____

Wife _____

Have you inherited any property or received gift of more than \$10,000 within the last ten (10) years?

_____ No

_____ Yes (If "Yes", please provide details)

Husband _____

Wife _____

Are you a Beneficiary, Trustee or Grantor of any Trust?

_____ No

_____ Yes (If "Yes", please provide details)

Husband _____

Wife _____

GIFT TAX RETURNS

Have you ever filed a Gift Tax Return?

_____ No

_____ Yes (If "Yes", please provide a copy of the Gift Tax Returns)

Husband _____

Wife _____

NAMES OF OTHER PROFESSIONALS (Such as accountant, stockbroker, insurance agent)

Accountant: _____

Investment Advisor: _____

Other: _____

CHARITABLE BEQUESTS: Would you like to leave anything to charity (a fixed amount or a percentage of your assets)? If so, list:

ASSETS

Describe all assets you own in the categories below. Indicate how an asset is titled by putting its value in the appropriate column. The value should be the estimated resale value. Use the following as an example:

Description	Husband's Property	Joint Property	Wife's Property
1989 Oldsmobile		\$10,000	
1985 Ford Mustang	\$7,000		

TANGIBLE PERSONAL PROPERTY (List separately, collections, valuable personal property such as artwork, jewelry and furs, vehicles (cars, campers, recreational vehicles, boats, airplanes).

Description	Husband's Property	Joint Property	Wife's Property
Household Goods:			
Personal Effects:			

(Note any loans secured by any of this property)

REAL ESTATE (Including residence, rental, vacation or retirement homes, vacant lots, farms, business property, oil and gas interests and their values)

Description	County & State	Husband's Property	Joint Property	Wife's Property

List mortgages on any of the above real estate.

BUSINESS ACTIVITIES (List any business activities you are actively involved in, such as a sole proprietorship, partnership or corporation; indicate whether there is a buy-sell agreement; and for any corporation, indicate if it is an S corporation for tax purposes.)

Description	Percent of interest	S Corporation?	Husband's Property	Joint Property	Wife's Property

BONDS, DEBENTURES, PROMISSARY NOTES, GOVERNMENT SECURITIES

Description	Husband's Property	Joint Property	Wife's Property

PARTNERSHIP INTERESTS

Name of Partnership	Limited or General	%	Husband's Property	Joint Property	Wife's Property

RETIREMENT PLANS (Pension, Profit Sharing, 401(k), KEOGH, IRAs, 403(b) Annuities; note if plans include life insurance.)

Name of Plan	Owner	Beneficiary	Value

LIFE INSURANCE (Including Credit Life)

Husband's Life

Company and Number	Policy Owner	Term or Whole Life	Beneficiary	Cash* Value	Face Value

Wife's Life

Company and Number	Policy Owner	Term or Whole Life	Beneficiary	Cash* Value	Face Value

Others

Insured	Company and Number	Policy Owner	Term or Whole Life	Beneficiary	Cash* Value	Face Value

If you are unsure about this information, please bring your insurance policies to the meeting.

*Note if there are any loans against the policy.

DEBTS

Explain below the character and amount of any major debts or obligations not already described above.

To Whom Debt Owed	Husband's Obligation	Joint Obligation	Wife's Obligation

ADDITIONAL COMMENTS

DIGITAL ESTATE INFORMATION

A. HARD COPY FILE LOCATIONS

Financial =

House materials =

Personal records =

Historical records =

B. DEFAULT INFORMATION

User names =

Passwords =

Secret questions =

 Mother's maiden name =

 Grade school =

 Street where grew up =

C. ELECTRONIC DEVICE ACCESS

<u>Device</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Computer				
Windows				
Cell phone				
Tablet				
GPS				
DVR/TiVo				
Television				

D. INCOME TAXES

<u>Item</u>	<u>Website</u>	<u>User Name</u>	<u>PIN</u>	<u>Password</u>
Federal income tax payment				
State income tax payment				
Prior computerized tax returns				

E. BANKING

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Checking				Icon =
Savings				Verbal password =

F. STOCK

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>

G. RETIREMENT

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
				Account # = Security question answer = Balance as of _____: \$

H. INSURANCE

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Health				
Life				

I. CREDIT CARDS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
American Express				
Visa				
Master Card				

J. DEBTS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Mortgage				
Cars				
Student Loan				

K. BUSINESSES

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Amazon.com				
e-Bay.com				
Airlines				
Netflix				

L. UTILITIES

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Electric				
Gas				
Internet				
Phone (landline)				
Phone (cell)				
TV				
Trash				
Water				

M. SOCIAL MEDIA

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Facebook				
LinkedIn				
YouTube				