

**Personal Information**

Names and other identifying information

Name you most often go by \_\_\_\_\_

Name you usually use to sign official documents \_\_\_\_\_

Former names or other names that you are known by \_\_\_\_\_

Residence address \_\_\_\_\_

Mailing address, if different, or second residence address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social security number \_\_\_\_\_

**Family Information**

Are you married? Yes No      If married, do you want joint wills (wills that mirror each other)? Yes No

Spouse's full name \_\_\_\_\_

Have you had other marriages? Yes No

If you have been married before, are you making child support payments? Yes No

If you have been married before, are you making any other payments to a former spouse? Yes No

If you have been married before, was your former spouse awarded an interest in any property that you still own, or in any of your retirement accounts? Yes No

Do you have children? Yes No

If yes, please list all children below:

Name	Age	Adopted?	By current marriage?	Does child have any disability that interferes with his/her ability to care for him or herself?
1.				
2.				
3.				
4.				
5.				
6.				

**Property and Assets**

List address or location and general description of all houses and land that you own:

1. \_\_\_\_\_ \$value \_\_\_\_\_  
How is title listed (or, how does the deed describe the owner(s))? \_\_\_\_\_
2. \_\_\_\_\_ \$value \_\_\_\_\_  
How is title listed (or, how does the deed describe the owner(s))? \_\_\_\_\_
3. \_\_\_\_\_ \$value \_\_\_\_\_  
How is title listed (or, how does the deed describe the owner(s))? \_\_\_\_\_
4. \_\_\_\_\_ \$value \_\_\_\_\_  
How is title listed (or, how does the deed describe the owner(s))? \_\_\_\_\_

Did you own any of the property listed above before you married? Yes No Which one? \_\_\_\_\_

Did you inherit any of the property above? Yes No Which one? \_\_\_\_\_

Are you the beneficiary of any trust? Yes No Describe: \_\_\_\_\_

List all retirement accounts you have. This may include IRA's, Keogh's, 401k's, 403b's, employer pension funds:

1. Type/Company \_\_\_\_\_ approx. value \$ \_\_\_\_\_  
Beneficiary designation? \_\_\_\_\_
2. Type/Company \_\_\_\_\_ approx. value \$ \_\_\_\_\_  
Beneficiary designation? \_\_\_\_\_
3. Type/Company \_\_\_\_\_ approx. value \$ \_\_\_\_\_  
Beneficiary designation? \_\_\_\_\_

Bank Accounts (include checking, savings, money market, CD's, and trust accounts for minors that your name is on):

Name of Financial Institution & account number	Type of Account	\$\$ Amount
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		

Securities – List all brokerage accounts, mutual funds, individual stocks, and bonds or other securities:

Name	Type	Approximate value

Cars, Boats, RV's, Motorcycles

Description	How does title read	\$\$ Value	Current loan amount?

Personal Property: Please list a general value for all your ordinary "stuff," including clothes, furniture, books, electronics, etc. List and value separately anything of particular value, i.e., jewelry, musical instruments, antiques, art, collectibles, etc.

Item (or group of items)	owner(s)	approx market value

Do you have pets? Yes No Describe \_\_\_\_\_

Business Interests: Other than publicly traded stocks, do you have an ownership or other interest in any business? If so, list the business, type of interest, and approximate value of your interest.

\_\_\_\_\_  
\_\_\_\_\_

Money Owed To You: Do you hold any loans notes? If so, please list the debtor, date of note and payment completion date, and current balance still owed on the loan.

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Do you anticipate receiving an inheritance or other sum of money, for example from a pending lawsuit? If so, please describe and give the approximate expected value:

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Do you own any copyrights or patents? Yes No If yes, describe: \_\_\_\_\_

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### Debts

List any significant debts you currently owe, such as mortgage, auto loans, credit cards, etc . . .

Type/Account number	date anticipated to be paid off	Current balance
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### Miscellaneous Questions

Do you currently receive government benefits (social security, disability, etc)? Yes No

Do you have any children that receive government benefits? Yes No

Do you provide significant financial support to any adult child or other person? Yes No

Have you ever filed a gift tax return? Yes No

Do you have a current will, trust, or other estate planning document? Yes No

Have you or your spouse signed a pre- or post-nuptial agreement? Yes No

Do you or your spouse have a long-term care insurance policy? Yes No

### Decision Makers

For each of the positions below, please list the name, address, phone and relationship to you for the person(s) you want to designate for each role. The same person can serve in multiple roles, or you can have different people in each. You should name additional people to serve in each role if the person you initially designate is not able to serve.

Power of Attorney to handle your affairs for you if you cannot:

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Person to make medical decisions for you if you cannot:

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Executor of your will, i.e., the person responsible for seeing that your wishes are carried out:

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Guardian for Minor or Incapacitated Adult Children:

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**Other Contact Information**

If there are any persons (other than your spouse or children) or charitable organizations that you wish to provide for in your will, please list them here:

Name	relation/connection to you	address/phone/email
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Your personal attorney: \_\_\_\_\_

Your accountant: \_\_\_\_\_

Your financial advisor: \_\_\_\_\_

Your life insurance agent: \_\_\_\_\_

Your primary physician: \_\_\_\_\_

**Additional Information**

Please tell me anything else you think I should know, including any ideas you have about how you want to handle your estate.

Law Office of Pamela Parker