

Children's Personal Information

Name _____
Address: _____
City/State: _____
Work Phone: _____
Home Phone: _____
SSN: _____
DOB: _____
Spouse Name: _____
Children's Name(s): _____

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Address: _____
City/State: _____
Work Phone: _____
Home Phone: _____
SSN: _____
DOB: _____
Spouse Name: _____
Children's Name(s): _____

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Home Phone: _____
SSN: _____
DOB: _____
Spouse Name: _____
Children's Name(s): _____

Key Advisors to be Contacted:

Agent under Power of Attorney – Property: Name _____
Phone: _____ Address: _____

Agent under Power of Attorney – Health Care Name _____
Phone: _____ Address: _____

Personal Representative or Trustee Name _____
Phone: _____ Address: _____

Stock Broker/Financial Planner Name _____
Phone: _____ Address: _____

Accountant Name _____
Phone: _____ Address: _____

Life Insurance Agent Name _____
Phone: _____ Address: _____

General Insurance Agent Name _____
Phone: _____ Address: _____

Other Advisor (specify type) Name _____
Phone: _____ Address: _____

Other Advisor (specify type) Name _____
Phone: _____ Address: _____

Other Advisor (specify type) Name _____
Phone: _____ Address: _____

Assets & Liabilities

Date Form Completed _____

Real Property:

Description of Property	Estimated Value	Encumbrance Information and Balance Due

Vehicles (automobiles, boats, motorcycles, etc.):

Description of Property	Estimated Value	Encumbrance Information and Balance Due

Cash Accounts

(Checking & Savings Accounts, Brokerage Accounts, Certificates of Deposits)

Financial Institution	Account Number	Estimated Value

Stocks and Bonds

Description of Security	# of Shares	Estimated Value

Retirement Accounts

(401k, IRA, 403b, Keogh, SIMPLE, SEP)

Financial Institution	Estimated Value	Beneficiary

Life Insurance & Annuities

Name and Address of Insurer/Annuity Provider	Name of Owner	Amount of Death Benefit	Name of Beneficiary

Other Monetary Assets
(Contracts, Business Interests, Accounts Receivable)

Description	Estimated Value

Personal Property of Significant Value
(Jewelry, Antiques, Collectibles)

Description	Estimated Value

List of Other Beneficiaries

Beneficiaries OTHER THAN A SPOUSE OR CHILDREN, should be listed in here so that they can be notified of any proceedings under a will or a trust. Only the surviving spouse, children, parents and siblings of the deceased, and those specifically mentioned in a will or trust, are legally entitled to notice of any probate proceeding.

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Home Phone: _____

Home Phone: _____

SSN: _____

SSN: _____

DOB: _____

DOB: _____

Relationship
to Client: _____

Relationship
to Client: _____

=====

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City/State: _____

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Work Phone: _____

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Home Phone: _____

Home Phone: _____

SSN: _____

SSN: _____

DOB: _____

DOB: _____

Relationship
to Client: _____

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to Client: _____