

Children's Personal Information

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

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

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City/State/Zip: _____
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Cell Phone: _____
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DOB: _____
Spouse Name: _____
Children's Name(s): _____

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Children's Name(s): _____

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

Agents/Personal Representatives/Trustees

PRIMARY Power of Attorney – Financial:

Name _____

Phone: _____

BACK-UP Power of Attorney – Financial:

Name _____

Phone: _____

PRIMARY Power of Attorney – Health Care:

Name _____

Phone: _____

BACK-UP Power of Attorney – Health Care:

Name _____

Phone: _____

PRIMARY Personal Representative or Trustee:

Name _____

Phone: _____

BACK-UP Personal Representative or Trustee:

Name _____

Phone: _____

Key Advisors to be Contacted

Stock Broker/Financial Planner

Name _____

Phone: _____ Address: _____

Accountant or Tax Preparer

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: _____

Date Form Completed _____

Assets & Liabilities

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

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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Cell Phone: _____

Cell Phone: _____

SSN: _____

SSN: _____

DOB: _____

DOB: _____

Relationship
to Client: _____

Relationship
to Client: _____

=====

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City/State/Zip: _____

Work Phone: _____

Work Phone: _____

Cell Phone: _____

Cell Phone: _____

SSN: _____

SSN: _____

DOB: _____

DOB: _____

Relationship
to Client: _____

Relationship
to Client: _____