

CONFIDENTIAL

JOHN & JANE CLIENT  
PRELIMINARY ESTATE PLANNING INFORMATION

*(Please review and correct any filled in information, especially name spellings)*

JOHN'S NAME INFORMATION:

JANE'S NAME INFORMATION:

FIRST NAME: \_\_\_\_\_

FIRST NAME: \_\_\_\_\_

MIDDLE: \_\_\_\_\_

MIDDLE: \_\_\_\_\_

JR., SR. II, III, IV? \_\_\_\_\_

MAIDEN: \_\_\_\_\_

Name I prefer to be called: \_\_\_\_\_

Name I prefer to be called: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

BIRTHPLACE: \_\_\_\_\_

BIRTHPLACE: \_\_\_\_\_

SSN: \_\_\_\_\_

SSN: \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_

JOHN'S CELL PHONE: \_\_\_\_\_

JANE'S CELL PHONE: \_\_\_\_\_

JOHN'S WORK PHONE: \_\_\_\_\_

JANE'S WORK PHONE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

DATE JOHN & JANE WERE MARRIED AND WHERE: \_\_\_\_\_

*PRIOR MARRIAGES OF JOHN (FULL NAMES OF FORMER SPOUSES, DATE DIVORCED OR DECEASED):*

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

*PRIOR MARRIAGES OF JANE (FULL NAMES OF FORMER SPOUSES, DATE DIVORCED OR DECEASED):*

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

CHILDREN BORN TO OR ADOPTED BY JOHN AND JANE *DURING THEIR MARRIAGE* (FULL NAMES):

(1) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

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

(2) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

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

CHILDREN BORN TO OR ADOPTED BY *JOHN* DURING *PRIOR MARRIAGES* (FULL NAMES, WHETHER BORN OR ADOPTED AND NAME OF OTHER PARENT)

(1) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

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

(2) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

\_\_\_\_\_

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CHILDREN BORN TO OR ADOPTED BY *JANE* DURING *PRIOR MARRIAGES* (FULL NAMES, WHETHER BORN OR ADOPTED AND NAME OF OTHER PARENT)

(1) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

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

(2) \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

FULL NAMES AND AGES OF THIS CHILD'S CHILDREN (GRANDCHILDREN)

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

ASSET INFORMATION                      VALUE ESTIMATE      COMMENTS (COMPANY, BENEFICIARY, ETC.)  
 (GENERAL DESCRIPTION OK, BUT SUFFICIENT TO IDENTIFY PROPERTY) (DOLLAR VALUES ARE ESTIMATES, BUT DO NOT UNDERESTIMATE.)  
 (SPECIFICALLY STATE IF ANY IDENTIFIED PROPERTY IS LOCATED IN ANOTHER STATE)  
 (*Separate Property* = Any property you now have that was acquired by you before your current marriage to each other or acquired by you by gift, Will or inheritance during your current marriage to each other) (*Community Property* = Assume all other property you now have)

**SEPARATE PROPERTY OWNED BY JOHN**

Life Insurance on John                      \_\_\_\_\_                      \_\_\_\_\_  
 (State Amount, Owner, Beneficiary)

Life Insurance on Jane                      \_\_\_\_\_                      \_\_\_\_\_  
 (State Amount, Owner, Beneficiary)

IRAs, 401(k)'s, Profit Sharing, etc.                      \_\_\_\_\_                      \_\_\_\_\_

References                      \_\_\_\_\_                      \_\_\_\_\_

Other Real Estate                      \_\_\_\_\_                      \_\_\_\_\_

Stocks, Bonds, Mutual Funds                      \_\_\_\_\_                      \_\_\_\_\_

Cash, CD's Savings, Checking                      \_\_\_\_\_                      \_\_\_\_\_

Notes Where People Owe You Money                      \_\_\_\_\_                      \_\_\_\_\_

Business Interests                      \_\_\_\_\_                      \_\_\_\_\_

Cars, Jewelry, Furniture, etc.                      \_\_\_\_\_                      \_\_\_\_\_

**SEPARATE PROPERTY OWNED BY JANE**

Life Insurance on John                      \_\_\_\_\_                      \_\_\_\_\_  
 (State Amount, Owner, Beneficiary)

Life Insurance on Jane                      \_\_\_\_\_                      \_\_\_\_\_  
 (State Amount, Owner, Beneficiary)

IRAs, 401(k)'s, Profit Sharing, etc.                      \_\_\_\_\_                      \_\_\_\_\_

Residences                      \_\_\_\_\_                      \_\_\_\_\_

Other Real Estate                      \_\_\_\_\_                      \_\_\_\_\_

Stocks, Bonds, Mutual Funds \_\_\_\_\_

Cash, CD's Savings, Checking \_\_\_\_\_

Notes Where People Owe You Money \_\_\_\_\_

Business Interests \_\_\_\_\_

Cars, Jewelry, Furniture, etc. \_\_\_\_\_

**COMMUNITY PROPERTY OWNED BY JOHN & JANE**

Life Insurance on John  
(State Amount, Owner, Beneficiary) \_\_\_\_\_

Life Insurance on Jane  
(State Amount, Owner, Beneficiary) \_\_\_\_\_

IRAs, 401(k)'s, Profit Sharing, etc. \_\_\_\_\_

Residences \_\_\_\_\_

Other Real Estate \_\_\_\_\_

Stocks, Bonds, Mutual Funds \_\_\_\_\_

Cash, CD's Savings, Checking \_\_\_\_\_

Notes Where People Owe You Money \_\_\_\_\_

Business Interests \_\_\_\_\_

Cars, Jewelry, Furniture, etc. \_\_\_\_\_

Please provide me with copies of your existing Wills, Trust Agreement(s), Powers of Attorney, and Medical Powers/Living Wills, etc.

JOHN: STATE HOW YOU WANT YOUR SEPARATE PROPERTY AND YOUR ONE-HALF OF COMMUNITY PROPERTY DIVIDED ON YOUR DEATH. NAME WHO YOU WANT TO RECEIVE IT IF THEY SURVIVE YOU AND THE NEXT PERSONS TO RECEIVE IT IF THEY DON'T SURVIVE YOU. (It is not necessary to state your wishes with regard to specific items of jewelry, personal effects and the like, unless you want to. Texas allows a written memorandum, separate from the Will, concerning such things.)

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JANE: STATE HOW YOU WANT YOUR SEPARATE PROPERTY AND YOUR ONE-HALF OF COMMUNITY PROPERTY DIVIDED ON YOUR DEATH. NAME WHO YOU WANT TO RECEIVE IT IF THEY SURVIVE YOU AND THE NEXT PERSONS TO RECEIVE IT IF THEY DON'T SURVIVE YOU. (It is not necessary to state your wishes with regard to specific items of jewelry, personal effects and the like, unless you want to. Texas allows a written memorandum, separate from the Will, concerning such things.)

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**WHOM DO YOU WANT TO NAME AS THE EXECUTOR OF YOUR ESTATE?**

(Spouses normally name each other first, then at least one alternate.)

John

Jane

- |          |          |
|----------|----------|
| 1. _____ | 1. _____ |
| 2. _____ | 2. _____ |
| 3. _____ | 3. _____ |

**WHOM DO YOU WANT TO NAME AS AGENT ON YOUR GENERAL FINANCIAL POWER OF ATTORNEY?**

(Spouses normally name each other first, then at least one alternate. This power of attorney gives the person or persons you name the power to sign your name if you are not able to do so. For instance, it can be used to sign a deed or a tax return, or to make gifts of your property.)

John

Jane

- |  |  |
|--|--|
| 1. _____<br>Address: _____<br>Phone: _____ | 1. _____<br>Address: _____<br>Phone: _____ |
| 2. _____<br>Address: _____<br>Phone: _____ | 2. _____<br>Address: _____<br>Phone: _____ |
| 3. _____<br>Address: _____<br>Phone: _____ | 3. _____<br>Address: _____<br>Phone: _____ |

**WHOM DO YOU WANT TO NAME AS AGENT ON YOUR MEDICAL POWER OF ATTORNEY?**

(Spouses normally name each other first, then at least one alternate. This power of attorney gives the person or persons you name the power to make medical treatment decisions for you if you are not able to do so.)

John

Jane

- |  |  |
|--|--|
| 1. _____<br>Address: _____<br>Phone: _____ | 1. _____<br>Address: _____<br>Phone: _____ |
| 2. _____<br>Address: _____<br>Phone: _____ | 2. _____<br>Address: _____<br>Phone: _____ |
| 3. _____<br>Address: _____<br>Phone: _____ | 3. _____<br>Address: _____<br>Phone: _____ |

WHOM DO YOU WANT TO NAME AS GUARDIAN OF YOUR *PERSON* IF A GUARDIAN EVER NEEDS TO BE APPOINTED? (Spouses normally name each other first, then at least one alternate.)

John

Jane

- 1. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 2. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 3. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

- 1. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 2. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 3. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

WHOM DO YOU WANT TO NAME AS GUARDIAN OF YOUR *ESTATE* IF A GUARDIAN EVER NEEDS TO BE APPOINTED? (Spouses normally name each other first, then at least one alternate. Usually the same as the person or persons to serve as guardian of your person, but not required to be the same.)

John

Jane

- 1. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 2. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 3. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

- 1. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 2. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_
- 3. \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

Where do you plan to keep your original Wills and these Related Documents? \_\_\_\_\_

\_\_\_\_\_, Date: \_\_\_\_\_, 20\_\_\_\_  
John Client

\_\_\_\_\_, Date: \_\_\_\_\_, 20\_\_\_\_  
Jane Client