

ESTATE PLANNING SNAPSHOT QUESTIONNAIRE

DATE COMPLETED: YOUR PERSONAL INFORMATION Salutation Your legal name Name you want us to call you Current occupation. If retired, from what? Gross annual income Your Mailing Address/Street State/Zip County and state of residence City Home phone Business phone Date of Birth Date of Marriage Social Security number Other phone E-mail Your health: ☐ Good □ Fair □ Poor US Citizen: □Yes □No Have you ever lived as a married couple and acquired property in CA, WA, Marital Status Do you currently have an estate plan (i.e. trust, will, etc.)? NV, AZ, NM, TX, ID, LA or WI? □ Yes \square No YOUR SPOUSE/PARTNER'S PERSONAL INFORMATION Salutation Your legal name Name you want us to call you Current occupation. If retired, from what? Gross annual income Your Mailing Address/Street City State/Zip County and state of residence Home phone Business phone Date of Birth Date of Marriage Social Security number E-mail Other phone Your health: ☐ Good □ Fair □ Poor US Citizen: □Yes □No Marital Status Have you ever lived as a married couple and acquired property in CA, WA, Do you currently have an estate plan (i.e. trust, will, etc.)? NV, AZ, NM, TX, ID, LA or WI? $\square Yes$ □ No □ Yes \square No YOUR CHILDREN, if any (please use an additional sheet if necessary) How many children? Legal name Whose child is this? Date of Birth Social Security No. Spouse's name Legal name Whose child is this? Date of Birth Social Security No. How many children? Spouse's name Whose child is this? How many children? Legal name Date of Birth Social Security No. Spouse's name Whose child is this? Legal name Date of Birth Social Security No. Spouse's name How many children? BENEFICIARIES OTHER THAN YOUR CHILDREN, if any (please an additional sheet if necessary) Relationship Any special Notes Legal name Date of Birth Social Security No. Legal name Sex Relationship Date of Birth Social Security No. Any special Notes Who referred you to us? Name Firm Phone OTHER KEY PEOPLE Name Relationship Phone Name Relationship Phone

Relationship

Name

Phone

Your Assets	Value in Spouse/			Amount of Debt
Company Name	Value In Your Name	Partner's Name	Value Held Jointly	on Asset
Cash Accounts				
Cush recounts				
Investment Accounts				
Stocks				
Stocks				
Bonds				
Personal Effects				
reisonal Effects				
Detinement Plans				
Retirement Plans				
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Your Assets		Amount of Debt		
Company Name	Value In Your Name	Value in Spouse/ Partner's Name	Value Held Jointly	on Asset
Insurance Policies				
Insurance I oncies				
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Pension Plans				
Annuities				
Amunes				
Monies Owed To You				
D. J. IV. TVG. VDLV.				
Partnership, LLC, or LPA Interests				
Corporate Business Interests				
Sole Proprietorship Business Interests				
Oil, Gas & Mineral Interests				
Real Property				
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TOTALS				