ESTATE PLANNING QUESTIONNAIRE

PERSONAL DATA

	HUSBAND	WIFE
FULL NAME:		
OTHER NAMES:		
ADDRESS:		
PHONE:	Work__________/Cell__________	Work__________/Cell__________
DATE OF BIRTH:	___/___/________	___/___/________
SSN:	_ _ _ - _ _ - _ _ _ _	_ _ _ - _ _ - _ _ _ _
DATE CAME TO CALIF:	___/___/________	___/___/________

DATE/PLACE OF MARRIAGE:________________/____

FAMILY DATA

CHILDREN OF THIS MARRIAGE:

NAME/ADDRESS	BIRTHDATE	NAME/ADDRESS	BIRTHDATE

CHILDREN OF PRIOR MARRIAGE (HUSBAND):

NAME/ADDRESS	OTHER PARENT'S NAME	BIRTHDATE

CHILDREN OF PRIOR MARRIAGE (WIFE):

NAME/ADDRESS	OTHER PARENT'S NAME	BIRTHDATE

OTHER LIVING RELATIVES:

NAME:__________________ RELATIONSHIP:______________________

NAME:__________________ RELATIONSHIP:______________________

NAME:__________________ RELATIONSHIP:______________________

NAME:__________________ RELATIONSHIP:______________________

EMPLOYMENT INFORMATION

SALARY/OTHER EARNED INCOME (PRESENT & ESTIMATED FUTURE)

HUSBAND'S PLACE OF EMPLOYMENT:____________________________________

SALARY ______________ BENEFITS ______________________________

WIFE'S PLACE OF EMPLOYMENT:_______________________________________

SALARY ______________ BENEFITS ______________________________

OTHER INCOME (PRESENT & ESTIMATED FUTURE):

HUSBAND ____

WIFE ____

ASSETS & LIABILITIES

FOR EACH MAJOR ASSET PLEASE PROVIDE AS MUCH DETAIL AS POSSIBLE SINCE THIS INFORMATION WILL BE USED TO ASSIST YOU WITH FUNDING YOUR TRUST:

CLIENT TO TRANSFER:

A. REAL PROPERTY ADDRESS & ASSESSOR'S PARCEL NUMBER:

________ ____

________ ____

B. STOCKS, BONDS & MUTUAL FUNDS, INVESTMENT ACCOUNT
(company and # of shares)(are shares held in an investment account or stock certificate):

________ ____

________ ____

________ ____

________ ____

C. MONEY OWED TO YOU (PROMISSORY NOTES/OTHER OBLIGATIONS):

________ ____

________ ____

________ ____

D. LIFE INSURANCE POLICIES & ANNUITIES:

COMPANY NAME POLICY# INSURED FACE AMOUNT ADDRESS

________ ____

________ ____

________ ____

________ ____

________ ____

________ ____

E. GENERAL & LIMITED PARTNERSHIPS & BUSINESS AGREEMENTS:

F. RETIREMENT BENEFITS (PENSION, PROFIT SHARING, 401(k), IRA'S):

G. CASH, CHECKING ACCOUNTS, SAVINGS ACCOUNTS, C.D.'S, MONEY MARKET (PLEASE SPECIFY NAME OF INSTITUTION & ACCOUNT NUMBER):

H. MISCELLANEOUS ASSETS (MOBILE HOME, VEHICLES, BOATS, AIRPLANES, ETC.):

MAJOR LIABILITIES (MORTGAGES, LAWSUITS, ETC.)

VALUE OF NET ESTATE (ASSETS LESS LIABILITIES):$____________________

ESTATE PLANNING QUESTIONNAIRE

DOCUMENTS TO BE PROVIDED TO ATTORNEY:

FOR EACH MAJOR ASSET PLEASE PROVIDE THE FOLLOWING INFORMATION:

1. WHEN ACQUIRED (DATE OF PURCHASE)
2. COST (WHAT DID YOU PAY FOR IT WHEN PURCHASED)
3. PRESENT VALUE (APPROXIMATE)
4. LIENS AND ENCUMBRANCES (WHAT DO YOU OWE AGAINST PROPERTY)
5. HOW TITLE IS HELD (TENANTS IN COMMON, JOINT TENANTS, COMMUNITY PROPERTY, TENANCY BY THE ENTIRETY)
6. MARITAL STATUS WHEN ACQUIRED (MARRIED OR SINGLE)
7. YOUR DOMICILE WHEN ACQUIRED (WHERE YOU LIVED)

A. REAL PROPERTY DOCUMENTS
   1.) GRANT DEEDS & QUITCLAIM DEEDS (FOR PROPERTY YOU OWN)
   2.) PROMISSORY NOTES & DEEDS OF TRUST (FOR MONEY OWED TO YOU)
   3.) LEASES (PROPERTIES YOU DON'T OWN)

B. RETIREMENT BENEFITS, PENSION & PROFIT SHARING PLANS, KEOGH, IRA (STATEMENTS)

C. LIMITED PARTNERSHIP AGREEMENTS, GENERAL PARTNERSHIP AGREEMENTS, BUY & SELL AGREEMENTS, OTHER BUSINESS AGREEMENTS

D. LIFE INSURANCE POLICIES & ANNUITIES

E. INCOME TAX RETURNS (LAST YEAR FILED)

F. GIFT TAX RETURNS

G. DIVORCE DECREES (WITHIN PAST TWO YEARS)

H. MARITAL AGREEMENTS

I. ORIGINAL PRIOR WILLS

J. TRUST AGREEMENTS

K. MOBILE HOMES - CURRENT REGISTRATION & ORIGINAL OWNERSHIP CERTIFICATE

L. STOCKS, BONDS, INVESTMENT ACCOUNTS, MUTUAL FUNDS (STATEMENTS AND/OR ORIGINAL STOCK CERTIFICATES)