

OLSEN, WHITE, HAMBIDGE & WILLIAMS, LLP
CONFIDENTIAL ESTATE PLANNING INFORMATION

Date: _____

CONFIDENTIALITY: The information reported here will be held in the strictest confidence.

	<u>Husband</u>	<u>Wife</u>
Legal Name:	_____	_____
Other Names Used:	_____	_____
Social Security No.:	_____	_____
Citizenship:	_____	_____
	U.S. Other	U.S. Other
Date of Marriage:	_____	_____
Any previous spouses?	Yes No	Yes No
	_____ _____	_____ _____
Birth date:	_____	_____
Home Address:	_____	_____
	_____	_____
	City State Zip County	City State Zip County
Home Phone:	_____	_____
Occupation/ Business:	_____	_____
Business Phone:	_____	_____
Names of other advisors:	_____	
Accountant:	_____	
Insurance:	_____	

ASSETS

	Husband	Wife	Joint
1. Cash Accounts	_____	_____	_____
Location and Amount	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
2. Publicly Traded Stocks & Bonds, Mutual Funds	_____	_____	_____
3. Estimated Cash Value of Life Insurance	_____	_____	_____
4. Annuities	_____	_____	_____
5. Accounts, Notes, Loans, Mortgages Receivable	_____	_____	_____
	_____	_____	_____
6. Real Estate Interests, including residence (Equity) How titled	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
7. Automobiles (Equity)	_____	_____	_____
	_____	_____	_____
8. Miscellaneous Household Property	_____	_____	_____
9. Other Personal Property	_____	_____	_____
10. Unlisted Securities (CD's, etc.)	_____	_____	_____
11. Business Interests,	_____	_____	_____

CHILDREN:

Name

Date of Birth

Address (if not home)

_____	_____	_____
_____	_____	_____
_____	_____	_____

Are there any adopted children or step-children?

Name

Date of Birth

Address

_____	_____	_____
_____	_____	_____
_____	_____	_____

OTHER CONSIDERATIONS: (List here items such as prior marriages, support or settlement obligations, prenuptial agreement, special needs children, etc.)

Are either of you the beneficiaries of any trust? _____

Do either of you have a power of appointment under any trust? _____

Do either of you anticipate receiving an inheritance? _____

including closely-
held stock and
partnership interests.
Buy-Sell Agreement?

_____	_____	_____
_____	_____	_____

12. Retirement Benefits
(IRAs, Pensions, 401(k))

_____	_____	_____
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Location and amount

_____	_____	_____
_____	_____	_____
_____	_____	_____

13. TOTAL ASSETS
(Lines 1-12)

\$ _____	\$ _____	\$ _____
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LIABILITIES

	<u>Owing To</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
14. Bank Loans	_____	_____	_____	_____
15. Other Borrowings	_____	_____	_____	_____
16. Accounts & Bills Due (credit cards & Utilities)	_____	_____	_____	_____
17. Real Estate Mortgages	_____	_____	_____	_____
18. Other debts	_____	_____	_____	_____
19. TOTAL LIABILITIES (Lines 14-18)		\$ _____	\$ _____	\$ _____

NOTE: Describe any other liabilities, including threatened or pending litigation or reasonably ascertainable creditors: _____

INSURANCE

<u>Face Amount</u>	<u>Insured</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary</u>	<u>Owner</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Mortgage Insurance (if any)

Car and Home Insurance

Amount _____

Company _____

CHARITABLE INTERESTS: (Identify charities in which you are currently interested or which may benefit from your estate.)

FIDUCIARIES:

Personal Representatives

Who would you like to be your Personal Representative?

Husband

Wife

Initial:

Successor:

Guardians for Minor Children

Who would you like to be Guardians?

Name

Address

Initial:

Successor:

Trustee

Name

Address

Who would you like to name Trustee:

Initial:

Successor:

POWERS OF ATTORNEY (over your assets if you are incapacitated):

Who would you like to name your Power of Attorney?

Name

Address

Initial:

Successor:

LIVING WILL:

Yes

No

Do you have one?

Would you like one?

SIGNATURES

Husband

Wife