

Estate Planning Intake Form

Client's Legal Name: (name most often used to title property and accounts)		
Also Known As: (other names used to title property and accounts)		
Prefer to be called:		
Birth Date:	SS#	US Citizen?
Home Address:		
City:	State:	Zip:
Home Telephone:		
County of Residence:	Business Telephone:	
Employer:	Position:	
Business Address:		
City:	State:	Zip:
Email Address:		
<input type="checkbox"/> It is okay to communicate with me via my Email address.		
Date of marriage:		

Client's Spouse or Second Grantor's Legal Name: (name most often used to title property and accounts)		
Also Known As: (other names used to title property and accounts)		
Prefer to be called:		
Birth Date:	SS#	US Citizen?
Home Address:		
City:	State:	Zip:
Home Telephone:		
County of Residence:	Business Telephone:	
Employer:	Position:	
Business Address:		
City:	State:	Zip:

Email Address:
<input type="checkbox"/> It is okay to communicate with me via my Email address.
Date of marriage:

Name:	Birth Date:	Parent or Relationship:
Comments:		
Name:	Birth Date:	Parent or Relationship:
Comments:		
Name:	Birth Date:	Parent or Relationship:
Comments:		
Name:	Birth Date:	Parent or Relationship:
Comments:		
Name:	Birth Date:	Parent or Relationship:
Comments:		
Name:	Birth Date:	Parent or Relationship:
Comments:		

Contact & General Information	Sources Of Income	Amount
Company:	Salary:	
	Commissions and Bonus:	
	Interest and Dividends:	
	Real Estate Income:	
Business Name:	Other Income: Itemized:	
Employer:		
Employer's Address:		
Position/Profession:		
Length of Time in Present Position:	Total Income:	
Have you ever filed for bankruptcy?		
State all trusts in which you possess a present or expectancy interest?		
<p>Are you relying on your own income & assets for daily living expenses? If yes, list your annual income, total assets, and total liabilities.</p>	<p>Are you relying on the income & assets of another for daily living expenses? If yes, list the income, assets & liabilities of both you and the other person.</p>	

Assets		
	Total	% of Total
Checking and Savings Accounts		
Securities: Stocks, Mutual Funds (Market Value)		
Bonds: (Market Value)		
Retirement Accounts (401k, IRA's) (Market Value)		
Other Investments (Market Value)		
Real Estate (Market Value)		
Vehicle, Boat, Planes, Etc. (Market Value)		
Personal & Home Assets (Market Value)		
Other Assets (Market Value)		
Total		

Liabilities		
	Total	% of Total
Real Estate Loans/Mortgages Payable		
Vehicle, Boats, Planes, Etc. Loans Payable		
Credit Card Debt Payable		
Loans Payable on Personal/Home Assets		
Loans Payable to Banks or Credit Unions		
Other Liabilities or Debts Payable		
Unpaid Taxes or Liens Payable		
Total		
Net Worth		

Assets				
Checking and Savings Accounts				
Type of Account	Name of Account	Address of Institution	Date Account Opened	Current Balance
Total				

Securities: Stocks, Mutual Funds (Market Value)				
(Type Name of Stock, etc.)	Number of Shares	Purchase Date	Cost	Current Market Value
Total				

Bonds: (Market Value)			
(Type and Name of Bond)	Purchase Date	Cost	Current Market Value
Total			

Retirement Accounts (401k, IRA's) (Market Value)	
(Type and Name of Fund)	Current Market Value
Total	

Other Investments (Market Value)				
(Type of Investment)	Shares or % Ownership	Miscellaneous Description, If Needed	Cost	Current Market Value
Total				

Real Estate (Market Value)				
Describe Type of Property	Purchase Date	Original Cost	Current Balance Owing	Current Market Value
Total				

Vehicle, Boats, Planes, Etc. Loans Payable				
Description	Purchase Date	Original Cost	Current Balance Owing	Current Market Value
Total				

Personal & Home Assets (Market Value)				
Description	Purchase Date (If Known)	Original Cost	Current Balance Owing	Current Market Value
Total				

Business Interests (Market Value)				
Description	Purchase Date (If Known)	Original Cost	Current Balance Owing	Current Market Value
Total				

Other Assets (Market Value)		
Description	Current Balance Owing	Current Market Value
Total		

Liabilities				
Real Estate Loans/Mortgages Payable				
Name of Loan or Mortgage Holder	Behind on Payments?	Interest Rate	Monthly Payment Amount	Current Balance Owing
Total				

Vehicle, Boats, Planes, Etc. Loans Payable				
Description	Behind on Payments?	Interest Rate	Current Market Value	Current Balance Owing
Total				

Credit Card Debt Payable				
Type of Card	Behind on Payments?	Interest Rate	Monthly Payment Amount	Current Balance Owning
Total				

Loans Payable on Personal/Home Assets				
Description	Purchase Date (If known)	Original Cost	Current Market Value	Current Balance Owning
Total				

Loans Payable to Banks or Credit Unions				
Name of Bank or Credit Union	Interest Rate	Payment Amount	Original Balance	Current Balance Owning
Total				

Other Liabilities or Debts Payable				
Name of Individual or Creditor	Interest Rate	Payment Amount	Original Balance	Current Balance Value
Total				

Unpaid Taxes or Liens Payable				
To Whom Payable	Type of Tax Lien	Against What Property	Due Date	Current Balance Owning
Total				

Contingent Liabilities		
Are you the co-signer on any loans or agreements?	Are you involved in any lawsuits or legal action?	Other Contingent Liabilities

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