

Estate Planning Intake Form

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

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

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

<b>Name:</b>	<b>Birth Date:</b>	<b>Parent or Relationship:</b>
<b>Comments:</b>		
<b>Name:</b>	<b>Birth Date:</b>	<b>Parent or Relationship:</b>
<b>Comments:</b>		
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<b>Comments:</b>		
<b>Name:</b>	<b>Birth Date:</b>	<b>Parent or Relationship:</b>
<b>Comments:</b>		

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:	<b>Total Income:</b>	
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 &amp; assets for daily living expenses? If yes, list your annual income, total assets, and total liabilities.</p>	<p>Are you relying on the income &amp; assets of another for daily living expenses? If yes, list the income, assets &amp; liabilities of both you and the other person.</p>	

<b>Assets</b>		
	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)		
<b>Total</b>		

<b>Liabilities</b>		
	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		
<b>Total</b>		
<b>Net Worth</b>		

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

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

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

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

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

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

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

<b>Personal &amp; Home Assets (Market Value)</b>				
Description	Purchase Date (If Known)	Original Cost	Current Balance Owing	Current Market Value
<b>Total</b>				

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

<b>Other Assets (Market Value)</b>		
Description	Current Balance Owing	Current Market Value
<b>Total</b>		

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

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



<b>Credit Card Debt Payable</b>				
Type of Card	Behind on Payments?	Interest Rate	Monthly Payment Amount	Current Balance Owing
<b>Total</b>				

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

<b>Loans Payable to Banks or Credit Unions</b>				
Name of Bank or Credit Union	Interest Rate	Payment Amount	Original Balance	Current Balance Owing
<b>Total</b>				

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

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

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



11508 W. 183rd Place NW  
 Orland Park, Illinois 60467  
 P 815.600.8950 F 815.600.8519  
 info@sterkfamilylaw.com  
 www.sterkfamilylaw.com