

ESTATE PLANNING INFORMATION SHEET

	DATE:					FILE NO.:
FE	NAME: PRESENT AG	FE:				
	[First]	[Initial]	[Last/Maiden]			
	BORN:	PLACE:		So	OCIAL SECURITY NO).:
	/ / [Date]	[City]	[State]	_		
JSBAND	NAME: PRESENT AG	FE:				
	[First]	[Initial]	[Last]			
	BORN:	PLACE:		So	OCIAL SECURITY NO):
	/ / [Date]	[City]	[State]			
RESENT ARRIAGE	DATE:	PLACE:				YEARS:
	/ / [Date]	[City]			[Country]	[#]

If you were previously married, please attach a copy of your Judgment for Divorce and Property Settlement Agreement.



PREVIOUS MARRIAGE		PLACE:				YEARS:
	/ / [Date]	[City]		[State]	[Country]	[#]
	Name of I	PREVIOUS SPOUSE:		Status:		
		REVIOUS STOUSE.		STATES.		
	[First]	[Initial]		[Last/Maiden]		[Ex/Deceased]
	#2:	PLACE:				YEARS:
	/ /					
	[Date]	[City]		[State]	[Country]	[#]
	NAME OF I	PREVIOUS SPOUSE:		STATUS:		
	[First]	[Initial]		[Last/Maiden]		[Ex/Deceased]
CHILDREN	#1 NAME:			PRESENT AC	GE:	
	[First]	[Initial]	[Last at Birth]	[Married Nam	ne]	[S.S.#]
	BORN:	Address, if di	FFERENT:			
	/ / [Date]	[# & Street]	[City]	[State	e/Zip]	
	□ If not the	e child of both spouses	S			



#2 NAME: PRESENT AG	Е:			
[First] [Initial]	[Last at Birt	th] [Married Name]	[S.S.#]
Born:	Address, if diff	FERENT:		
/ /				
/ / [Date]	[# & Street]	[City]	[State/Zip]	
☐ If not the c	hild of both spouses			
#3 Name: Present Ag	Е:			
[First] [Initial]	[Last at Birt	th] [Married Name]	 [S.S.#]
BORN:	Address, if difi	FERENT:		
/ /				
Date]	[# & Street]	[City]	[State/Zip]	
OTHER PO' #1 Name: Present Ag	TENTIAL BENEFI e:	CIARIES		
[First]	[Initial]	[1	Last]	[S.S.#]
RELATION:	Address:			
	[# & Street]	[City]	[State/Zip]	
#2 Name: Present Ag	E:			
[First]	[Initial]	[1	Last]	[S.S.#]
RELATION:	Address:			
	[# & Street]	[City]	[State/Zip	p]



PRIMARY RESIDENCE

	[# & Street]	[City]	[Block	:/Lot1		
	[[,]				
				/ /		
	[County]	[State/Zip]	[Date	Purchased]		
	PURCHASE PRICE:	PRESENT VALUE:	PRESENT EQUITY:	TAXES:		
	\$	\$	\$	\$/YR.		
ACATION						
	[# & Street]	[City]		[Block/Lot]		
			/ / [Date Purchased	_		
	[County]	[State/Zip]	[Date Purchased			
	PURCHASE PRICE:	PRESENT VALUE:	PRESENT EQUITY:	TAXES:		
	\$	\$	\$	\$/YR.		
NVESTME PROPERTY						
	[# & Street]	[City]	[Block/Lot]	<u> </u>		
	[County]	[State/Zip]	/ / [Date Purchased]			
	[County]	[State/Zip]	[Bate I arenasea]			
	PURCHASE PRICE:	PRESENT VALUE:	PRESENT EQUITY:	TAXES:		
	\$	\$	\$	\$/YR.		
	DESCRIPTION:	Inco	DME:			
		\$	/MO. \$	YR.		
	[Vacant Lot/Residential/Co					
	*** PLEASE ATTACH	COPIES OF ALL DEED AN	ND MORTGAGES.			
NCOME	EMPLOYMENT:					
	HUSBAND -	overl [Posit	ion] \$	_		
	I E.mni	UVELI I POSII	IOILI I SAIATVI			



Wife -			\$		
[E	mployer]	[Position]	[Salary]		
OTHER:					
			\$		
[Source/Description]		[Yearly]	Ψ		
	CH COPIES OF FEDE		TE TAX RETUR	NS AND FINA	ANCIAL STATEMENTS OI
BANK ACCOUNTS					
Please attach cop	ies of your most rec	ent Bank Sta	tements.		
#1 ACCOUNT	·				
######################################					
[Bank Name]	[Address	s]			
	#	\$			
[Account Type]	#_ [Account Number]	[Am	ount]		
#2 ACCOUNT					
[Bank Name]	[Address	B]			
	#	\$			
[Account Type]	#_ [Account Number]	φ <u></u> [Am	ount]		
#3 ACCOUNT					
[Bank Name]	[Address	s]			
	#	\$			
[Account Type]	[Account Number]		iount]		



SECURITIES

Please attach copies of your most recent Securities/Stock Account Statements

[Qty] [Nam	ne] [Excl	nange]	/ / [Date]	
\$/Sh. [Purchase Price]	\$/Tot. \$	/Sh.	\$/Tot. [Present Value]	
#2 STOCK: PURCHASED:				
[Qty] [Nam	ne] [Exchange]		/ / [Date]	
\$/Sh. [Purchase Price]	\$/Tot. \$	/Sh.	\$/Tot. [Present Value]	
#1 OTHER: PURCHASED:				
[Oty]	[Description]		/ / [Date]	
			\$/TOT. [Present Value]	
#2 OTHER:				
PURCHASED: [Qty] [/ / [Date]	
\$/Sh.			\$/Tot.	
[Purchase Price]			[Present Value]	
	_			
CTS LIFE INS	SURANCE POLICIES:			
CTS LIFE INS	[Beneficiary]	 [Type	\$ [Amount]	



PERSONAL PROPERTY

PENSION/PI	ROFIT SHARING:		
			\$
[Insured]	[Beneficiary]	[Type]	[Amount]
			\$
[Insured]	[Beneficiary]	[Type]	[Amount]
*** PLEASE	E ATTACH COPIES OF ALL POLI	CIES AND PLANS.	
JEWELRY:			
		\$	
	[Description]		[Value]
		\$	
	[Description]		[Value]
		\$	
	[Description]		[Value]
Furs:			
		\$	
	[Description]	<u> </u>	[Value]
		\$	
	[Description]	<u> </u>	[Value]
Collectio	DNS:		
		Φ.	
	[Description]	\$	[Value]
		\$	
	[Description]	<u> </u>	[Value]
COMMENTS	S:		