



REID AND RIEGE, P.C.
COUNSELLORS AT LAW

CONFIDENTIAL ESTATE PLANNING INFORMATION FORM

<u>Legal Name</u>	<u>(Nickname)</u>	<u>Date of Birth</u>	<u>Soc. Sec.#</u>
Client			
Client			
Child (Spouse/children? _____)			
Child (Spouse/children? _____)			
Child (Spouse/children? _____)			

Home address

Alternate address (mailing or second residence)

Street Address

Town, State, Zip Code
Home telephone number: (____)____ - _____

Street Address

Town, State, Zip Code
Alternate telephone number: (____)____ - _____

Business address: _____

Business address: _____

Business name and street address

Town, State, Zip Code
Business telephone number: (____)____ - _____

Business name and street address

Town, State, Zip Code
Business telephone number: (____)____ - _____

E-mail address (optional): _____

SUMMARY OF ASSETS

Ownership and Approximate Market Value

	<u>Husband</u>	<u>Joint/Survivor</u>	<u>Wife</u>
<u>Real estate</u> _____	_____	_____	
<u>Savings & cash</u> _____	_____	_____	
<u>Securities</u> (stocks, bonds, mutual funds <i>other than</i> retirement plans) _____	_____	_____	
<u>Retirement Plans:</u>			
Pension _____	_____		
Profit sharing _____	_____		
Deferred compensation _____	_____		
IRAs _____	_____		
401K _____	_____		
<u>Life Insurance</u> (face value and beneficiary) _____	_____	_____	
<u>Business Interest</u> (indicate if Sub-S) _____	_____	_____	
Cars, furniture, jewelry, boats, artwork, etc. _____	_____	_____	
Potential Inheritances _____	_____		

Total _____

RELATED INFORMATION

1. If either spouse is not a U.S. citizen, please identify citizenship.
2. If any of the children are not children of this marriage, please indicate relationship on page 1. All children of either husband or wife should be listed, including deceased children.
3. Do you have any miscellaneous assets and liabilities, such as Lawsuits, Guarantees, Stock Options, etc.? Please indicate the value(s) on page 2.
4. Do either of you have any continuing obligations under a divorce decree? Will need copy of decree.
5. Do you have a prenuptial agreement? Will need copy.
6. Have you created or are you a beneficiary of any trust? Will need copy of each trust.
7. Have you made any taxable gifts? Will need copy of any Gift Tax Return.
8. Have you ever lived in a community property state while married to each other?
9. Where original documents to be kept:
10. Name of Accountant:
Address:
Phone:
11. Name of Insurance Agent and/or Financial Planner:
Address:
Phone: