

FOSTER, O'DANIEL & HAMBIDGE, LLP

CONFIDENTIAL ESTATE PLANNING INFORMATION

Date: _____

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

Husband

Wife

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: _____

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? _____

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,	_____	_____

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

12.	Retirement Benefits	_____	_____
	(IRAs, Pensions, 401(k))	_____	
	Location and amount	_____	_____

13.	TOTAL ASSETS (Lines 1-12)	\$ _____	\$ _____
		\$ _____	

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: _____

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