

**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:

<u>Name</u>	<u>Date of Birth</u>	<u>Address (if not home)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Are there any adopted children or step-children?

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

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: \_\_\_\_\_

**INSURANCE**

<u>Face Amount</u>	<u>Insured</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary</u>	<u>Owner</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

  

_____	<u>Mortgage Insurance (if any)</u>	_____	<u>Car and Home Insurance</u>	_____
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<u>Amount</u>	_____	_____
<u>Company</u>	_____	_____

CHARITABLE INTERESTS: (Identify charities in which you are currently interested or which may benefit from your estate.)

\_\_\_\_\_

FIDUCIARIES:

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

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Husband

Wife