



**CONFIDENTIAL ESTATE PLANNING INFORMATION SHEET**

Date: \_\_\_\_\_

**I. PERSONAL AND FAMILY INFORMATION**

Client's Name: \_\_\_\_\_  
(First) (Middle) (Maiden) (Last)

Home Address: \_\_\_\_\_  
(Include County) \_\_\_\_\_

Telephone: Home \_\_\_\_\_ Business \_\_\_\_\_

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Soc. Sec.#: \_\_\_\_\_

Business Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

U.S. Citizen: Yes \_\_\_\_\_ No \_\_\_\_\_ If No, Country \_\_\_\_\_

Spouse's Name: \_\_\_\_\_  
(First) (Middle) (Maiden) (Last)

Telephone: Home \_\_\_\_\_ Business \_\_\_\_\_

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Soc. Sec.#: \_\_\_\_\_

Business Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

U.S. Citizen: Yes \_\_\_\_\_ No \_\_\_\_\_ If No, Country \_\_\_\_\_

Date and Place of Marriage: \_\_\_\_\_

Did either of you serve in the military? Yes \_\_\_\_\_ No \_\_\_\_\_ Who served? \_\_\_\_\_

Branch \_\_\_\_\_, Date of service: from \_\_\_\_\_ to \_\_\_\_\_

Children: Current location (City, State): DOB/Age

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Grandchildren: Names and Location (city, state) Parents DOB/Age

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other Beneficiaries: \_\_\_\_\_ DOB/Age \_\_\_\_\_

\_\_\_\_\_ DOB/Age \_\_\_\_\_

\_\_\_\_\_ DOB/Age \_\_\_\_\_

\_\_\_\_\_ DOB/Age \_\_\_\_\_

\_\_\_\_\_ DOB/Age \_\_\_\_\_

**II. ESTATE PLANNING INFORMATION**

**A. EXECUTORS** (If co executors, indicate with an asterisk [\*]).

	<b>Spouse's Will</b>	<b>Spouse's Will</b>
<b>EXECUTOR:</b>		
Name:	_____	_____
Address:	_____	_____
	_____	_____
Phone:	_____	_____
Relationship:	_____	_____

<b>ALTERNATE EXECUTOR:</b>		
Name:	_____	_____
Address:	_____	_____
	_____	_____
Phone:	_____	_____
Relationship:	_____	_____

<b>ALTERNATE EXECUTOR:</b>		
Name:	_____	_____
Address:	_____	_____
	_____	_____
Phone:	_____	_____
Relationship:	_____	_____