

## CONFIDENTIAL ESTATE PLANNING PERSONAL INFORMATION

	Husband	Wife
Full Name:	_____	_____
Also Known As (maiden)	_____	_____
Home Address:	_____	_____
City, State, Zip:	_____	_____
Home Phone:	_____	_____
Soc. Sec. #:	_____	_____
Date of Birth:	_____	_____
U.S. citizen?	( ) Yes ( ) No	( ) Yes ( ) No
	( ) Naturalized	( ) Naturalized
Living Parents Names:	_____	_____
Former Spouse(s) Names:	_____	_____

**Children:** (Include children from a previous marriage and adopted children. Indicate if any are adopted, step-children, foster children or children not of both spouses)

*\*\* If you have grandchildren, list the same information for them also.*

#	Full Name	Age	Address	Spouse	# of Children
1					
2					
3					
4					
5					
6					
7					
8					

Are any of these children deceased? If so, indicate which ones by number: \_\_\_\_\_

Have you and your spouse ever lived in a community property state? \_\_\_\_\_ (If you don't know what this is, we will discuss)

Please attach the following documents: Attached or N/A

1. Existing wills, trusts, or estate plans .....
2. Living wills, medical powers of attorney, patient advocate designations, etc.....
3. Durable powers of attorney .....
4. Gift tax returns filed by either spouse during lifetime .....
5. Income tax returns past 3 years .....
6. Self employment tax returns last 5 years .....
7. Business agreements or documents evidencing ownership of a company other than a publicly traded stock.....
8. Pre or post-nuptial agreements .....
9. Deeds or title insurance papers to all real estate owned .....
10. A net worth or asset statement .....



Treasury Bonds, Municipal Bonds, Savings Bonds, Corporate Bonds, Notes, and Mortgages:  
 (Describe as fully as possible, including estimated current value)

---



---



---



---



---



---



---

Retirement benefits: (pensions, IRA, 401(k), Keogh plans, Non-qualified plans, etc.):

Type of Plan	Ownership / Survivorship	Name of Beneficiary	Current Value / Death Benefits

Other Assets: (i.e. automobiles, household furnishings, heirlooms, autos, boats, aircraft, jewelry, collections) Describe and Estimate Value.

---



---



---



---



---



---

Life Insurance and Annuities: (Include employer provided)

Insured:	Company:	Type: (term, whole, annuity, Universal)	Owner:	Beneficiary:	Face Amount / Outstanding Loan Amount

### Distribution Objectives

If you don't have an existing will, this "Distribution Objectives" section gives you instructions on how to make a emergency will that is enforceable in Michigan. This will can cover you and your spouse until the process of drafting the plan is complete. **If you do have a up-to-date will, you may simply answer the questions numbered 3-6.** Each spouse should answer the following questions on a separate sheet of paper, in his or her own handwriting, in complete sentences, titling it "WILL", signing, and dating it.

