

ESTATE PLANNING INFORMATION

PERSONAL INFORMATION

DATE: _____

Legal name: _____

Date of birth: _____ SS#: _____ U.S. citizen: Y / N

Veteran: Y / N If so, during what timeframe did you serve (approx.)? _____

Spouse's name: _____

Date of birth: _____ SS#: _____ U.S. citizen: Y / N

Veteran: Y / N If so, during what timeframe did you serve (approx.)? _____

Marital Status: _____ Married. Date of marriage: _____

_____ Divorced. Are there any lingering obligations to ex-spouse? _____

_____ Single/never married.

_____ Widowed. Date of spouse's death: _____

Address: _____

Telephone: (home) () _____ (cell) () _____

(work) () _____ (spouse cell) () _____

Email: _____ Spouse Email : _____

How did you learn about this firm? _____

FAMILY INFORMATION

Child #1 (with _____ (if not mutual with current spouse))

Legal name: _____ Date of birth: _____

Address: _____

Telephone: _____ Email: _____

Spouse and children's names: _____

Child #2 (with _____ (if not mutual with current spouse))

Legal name: _____ Date of Birth: _____

Address: _____

Telephone: _____ Email: _____

Spouse and children's names: _____

Child #3 (with _____ (if not mutual with current spouse))

Legal name: _____ Date of birth: _____

Address: _____

Telephone: _____ Email: _____

Spouse and children's names: _____

Child #4 (of _____ (if not mutual with current spouse))

Legal name: _____ Date of birth: _____

Address: _____

Telephone: _____ Email: _____

Spouse and children's names: _____

Please note any special circumstances related to your children, including divorce, separation, physical/mental impairments, and/or estrangements: _____

Do you have a Safety Deposit Box? If so, **what is the box number** and where is it located? _____

ASSET INFORMATION

Please list each asset you (and/or your spouse) own, even if jointly held with another person or in a trust. Please use the following codes to identify whose name is on each asset. **Please bring a copy of each deed and most recent real estate tax bills(s).**

JT Titled in both spouse's names together
 I Titled in one person's name individually (please also name which spouse)
 JT w/ (fill in blank) Titled in joint names (not spouse) – please indicate names
 TR Titled in a trust—please indicate name and trustee(s)

Real Estate

(1) Property address: _____

How Titled: _____ Fair Market Value: _____

Mortgage Balance: _____ Tax-assessed Value: _____

Year Acquired: _____ Purchase Price: _____

Did you acquire any portion of this property as a gift? _____

Do you have a Homestead? _____(If so, please attach a copy.)

Do you have a home equity line? _____ How much is drawn out? _____

(2) Property address: _____

How Titled: _____ Fair Market Value: _____

Mortgage Balance: _____ Tax-assessed Value: _____

Year Acquired: _____ Purchase Price: _____

Did you acquire any portion of this property as a gift? _____

Do you have a Homestead? _____(If so, please attach a copy.)

Do you have a home equity line? _____ How much is drawn out? _____

Bank Accounts

	How titled	Name of bank	Type (ckg/sav/CD)	Current value
(1)	_____	_____	_____	_____
(2)	_____	_____	_____	_____
(3)	_____	_____	_____	_____
(4)	_____	_____	_____	_____
(5)	_____	_____	_____	_____

IRAs/401(k)s/other retirement benefits

Owner	Name of institution	Beneficiaries	Current value
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- (1) _____
- (2) _____
- (3) _____
- (4) _____

Stocks/Bonds/Mutual Funds

	How titled	Name of company	Original cost	# Shares	Current value
(1)	_____	_____	_____	_____	_____
(2)	_____	_____	_____	_____	_____
(3)	_____	_____	_____	_____	_____
(4)	_____	_____	_____	_____	_____
(5)	_____	_____	_____	_____	_____
(6)	_____	_____	_____	_____	_____

Life insurance

	Insured	Name of company	Face value	Cash surrender	Death benefit
(1)	_____	_____	_____	_____	_____
	Beneficiaries: _____		Type (if term, until when?) _____		
(2)	_____	_____	_____	_____	_____
	Beneficiaries: _____		Type (if term, until when?) _____		
(3)	_____	_____	_____	_____	_____
	Beneficiaries: _____		Type (if term, until when?) _____		
(4)	_____	_____	_____	_____	_____
	Beneficiaries: _____		Type (if term, until when?) _____		

Who is your CPA? _____
Who is your investment/financial planner? _____
Who is your insurance agent? _____
Do you need a referral to any of the above professionals? _____

Automobiles/boats/motor homes/trailers

How titled	Year/make/model	Loan value	Current value
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- (1) _____
- (2) _____
- (3) _____
- (4) _____

Are all of these vehicles registered? _____

Are all registered vehicles registered in Massachusetts? _____

Other Assets (all business interests, art/collectibles/antiques of significant value)

	How titled	Description	Current value
(1)	_____	_____	_____
(2)	_____	_____	_____
(3)	_____	_____	_____
(4)	_____	_____	_____

Are you anticipating any inheritances/gifts of significance? When? _____

INCOME INFORMATION

Please list *monthly* gross income figures (i.e., before any deductions).

	You (occupation: _____)	Spouse (occupation: _____)
Type		
Wages	\$ _____	\$ _____
Social Security	\$ _____	\$ _____
Pension from: _____	\$ _____	\$ _____
Pension from: _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____

OTHER PERTINENT INFORMATION YOU WANT US TO KNOW
