ESTATE PLANNING INFORMATION WORKSHEET

The information requested in this worksheet is necessary to advise you regarding your estate plan and to prepare your documents. This information will be held strictly confidential. Please complete as much information as you can and bring it with you when you meet with the attorney. Don't worry about information that is not readily available or decisions not yet made. All of this information will be discussed in detail with the attorney. If you have your financial information in another format, like a financial statement, you don't need to fill out each blank on the worksheet. Providing copies of account statements can be helpful too.
Thank you.

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How were you referred to Pabst Holland & Reynolds, PLLC? ________________________________

To be completed by the client:
PART A

Personal Information

1. Full Name (Client 1): ____

2. Full Name (Client 2): ____

3. Address (including county): ____

   A. Home ____

   ____

   B. Business: ____

   ____

   C. Other: ____

   ____

4. Telephone Numbers:

   A. Home: ____

   B. Business (Client 1): ____

   Business (Client 2): ____

   C. Cell (Client 1): ____

   Cell (Client 2): ____

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D. Fax Number (Client 1): ____

Fax Number (Client 2): ____

5. E-mail address(es): (Client 1): ____

____

E-mail address(es): (Client 2): ____

____

Do we have permission to communicate with you via email? ☐ YES ☐NO

6. Occupation/Employer:

Client 1:____ Retired? ______________

Client 2:____ Retired? ______________

7. Date and Place of Birth:

Client 1: ____________________________________ U.S. Citizen? _______

Client 2: ____________________________________ U.S. Citizen? _______

8. Date and place of marriage: ____
or registration of domestic partnership: ______________________________________

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9. Information Concerning Children

Child's Name:	Child's Address:	Birth Date:
______________________	______________________	______________________
Child of:	______________________	

□ Client 1
□ Client 2
□ Both

Child's Name:	Child's Address:	Birth Date:
______________________	______________________	______________________
Child of:	______________________	

□ Client 1
□ Client 2
□ Both

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Child's Name:	Child's Address:	Birth Date:
______________________	______________________	______________________

Child of: ______________________

□ Client 1
□ Client 2
□ Both

Child's Name:	Child's Address:	Birth Date:
______________________	______________________	______________________

Child of: ______________________

□ Client 1
□ Client 2
□ Both

Does either client have support obligations from a prior marriage/relationship? ______________________

Do you want special provisions for the care of any pets? ____

Disposition of Property

10. Specific Bequests (such as jewelry, personal or household goods, cash gifts, etc.):

	Description of Item	Location	Beneficiary
a.	______________________	______________	______________________
b.	______________________	______________	______________________
c.	______________________	______________	______________________
d.	______________________	______________	______________________

11. Residue (assets remaining after specific bequests):

	Share of Estate	Beneficiary	Alternate Beneficiary (in event first beneficiary predeceases you)
a.	___________	______________________	______________________
b.	___________	______________________	______________________
c.	___________	______________________	______________________
d.	___________	______________________	______________________

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12. Trusts—please list the beneficiaries whose share of your estate will be retained in trust until they attain the age or other conditions stated below:

	Name of Beneficiary	Condition and/or Age
a.	____________________	____________________
b.	____________________	____________________
c.	____________________	____________________
d.	____________________	____________________

===

13. **Fiduciaries**

Whom do you want to serve in the following roles, if applicable?

	Executor/Personal Representative	Trustee	Guardian of Minor Children	Attorney-in-Fact under Power of Attorney
First Choice	____________	____________	____________	____________
Alternate	____________	____________	____________	____________
Second Alternate	____________	____________	____________	____________

An executor/personal representative administers the estate after your death. A trustee manages and distributes assets for a beneficiary. A guardian will be necessary if you have minor children and the children's parents die before your children turn age 18. An attorney in fact will handle your affairs, including such things as signing documents on your behalf, providing for your support, maintenance, health, etc., if you were to become incompetent or disabled.

Miscellaneous

14. Do you have a Community Property Agreement? ____________________

a. Is it recorded? If so, where? ____________________

b. If not recorded, where is it kept? ____________________

15. Do you have a Living Will? ____________________

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16. If you already have any of the following documents, please bring copies of them to our first meeting:

Wills	Pre-Nuptial or Post-Nuptial Agreement
Revocable Living Trust	Divorce Decree (if ongoing obligation)
Other Trust Agreements	Health Care Directive, Advance Directive or Living Will
Community Property Agreement	Any other estate planning documents
Durable Power of Attorney	

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PART B

Assets

1. **Real Estate:**

(Please attach copies of deeds and tax statements)

	Address	How Titled	Approximate Value	Mortgage Balance
a.	___________________________ ___________________________	______________________	$____________	$___________
b.	___________________________ ___________________________	______________________	$____________	$___________
c.	___________________________ ___________________________	______________________	$____________	$___________
d.	___________________________ ___________________________	______________________	$____________	$___________

2. **Bank Accounts (checking, savings, and CDs):**

	Bank	Type of Account	Names on Account	Account Number	Approximate Balance
a.	________________________	________	___________________	_________________	$___________
b.	________________________	________	___________________	_________________	$___________
c.	________________________	________	___________________	_________________	$___________
d.	________________________	________	___________________	_________________	$___________

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3. **Retirement Account (IRA, SEP, 401(k), 403(b), Keogh, TSA, Profit Sharing, etc.):**

	Company	Name on Account	Account Number	Approximate Value
a.	______________________	____________________	_____________________	$__________
b.	______________________	____________________	_____________________	$__________
c.	______________________	____________________	_____________________	$__________
d.	______________________	____________________	_____________________	$__________

4. **Brokerage Accounts, Mutual Funds, and Money Market Accounts (that are not retirement accounts):**

	Company/Broker	Name on Account	Account Number	Approximate Value
a.	______________________	____________________	_____________________	$__________
b.	______________________	____________________	_____________________	$__________
c.	______________________	____________________	_____________________	$__________
d.	______________________	____________________	_____________________	$__________

5. **Savings Bonds, Treasury Bills, etc. (not in brokerage account):**

(If you have several bonds, please feel free to bring them to the meeting rather than listing them all here.)

	Type	Denomination	Listed Owner	Maturity Date	Approximate Value
a.	_____________________	_______	_________________	_________________	$__________
b.	____________________	_______	_________________	_________________	$__________
c.	_____________________	_______	_________________	_________________	$__________

6. **Stocks Held in Certificate Form (not in brokerage account or Dividend Reinvestment Plans (DRIP)):**

	Company	Number of Shares	Name on Certificate	Approximate Value
a.	_____________________	_______	__________________________________	$__________
b.	____________________	_______	__________________________________	$__________
c.	_____________________	_______	__________________________________	$__________

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7. **Life Insurance Policies:**

	Company	Insured	Policy Number	Cash Value	Death Benefit	Employer Provided
a.	________________	___________	_______________	$_________	$_________	Y/N
b.	_______________	___________	_______________	$_________	$_________	Y/N
c.	________________	___________	_______________	$_________	$_________	Y/N

8. **Annuities (as titled on account):**

	Company	Annuitant	Name on Account	Account Number	Approximate Value
a.	______________________	_________	________________	_________________	$__________
b.	______________________	_________	________________	_________________	$__________
c.	______________________	_________	________________	_________________	$__________
d.	______________________	_________	________________	_________________	$__________

9. **Promissory Notes, Real Estate Contracts, and Other Receivables Owed to You:**
(Please attach copies of contracts or notes)

	Buyer/Borrower	Date of Note or Contract	Property Securing Note or Contract	Approximate Balance
a.	_____________________	___________________	__________________	$__________
b.	_____________________	___________________	__________________	$__________

10. **Stock Options, Employee Stock Purchase Plans, etc.:**

	Company	Owner	Vested	Unvested	Approximate Value
a.	______________________	_________	________________	_________________	$__________
b.	______________________	_________	________________	_________________	$__________
c.	______________________	_________	________________	_________________	$__________

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11. **Closely Held Business Interests:**

	Company	Owner	Shares/Units/ Percentage of Ownership	Approximate Value
a.	______________________________	___________________	_________________	$___________
b.	______________________________	___________________	_________________	$___________
c.	______________________________	___________________	_________________	$___________

12. **Other:**

(Please let us know if you have any other assets to those listed above, such as limited partnership interests, oil/gas/mineral rights, fine art or antique collection, etc.)

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