

**CONFIDENTIAL ESTATE PLANNING INFORMATION**

Submitted to: **Curtis L. Brown**

Submitted by: \_\_\_\_\_

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

**1. Husband:**

Full Legal Name: \_\_\_\_\_

Known As: \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Home

Address: \_\_\_\_\_ Zip \_\_\_\_\_

Email: \_\_\_\_\_ fax number: \_\_\_\_\_

Home Telephone: ( ) \_\_\_\_\_ County of Residence: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Employer: \_\_\_\_\_ Position: \_\_\_\_\_

Business

Address: \_\_\_\_\_ Zip \_\_\_\_\_

Business Telephone: ( ) \_\_\_\_\_

**2. Wife:**

Full Legal Name: \_\_\_\_\_ Maiden: \_\_\_\_\_

Known As: \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Employer: \_\_\_\_\_ Position: \_\_\_\_\_

Business

Address: \_\_\_\_\_ Zip \_\_\_\_\_

Business Telephone: ( ) \_\_\_\_\_

**3. Marital Information:**

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

Do you have a prenuptial or marital property agreement? Yes \_\_\_\_\_ No \_\_\_\_\_

Has either spouse been married before? Yes \_\_\_\_\_ No \_\_\_\_\_ If so, please provide name of prior spouse and date of death or divorce:

\_\_\_\_\_

**4. Children:**

Please indicate if adopted or by previous marriage. If a child is not the natural or adoptive child of both parents, please indicate whether the husband or wife is the natural or adoptive parent with an "H" or "W".

(a) Full Name: \_\_\_\_\_

Residence (City): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_

Names & ages of children (your grandchildren): \_\_\_\_\_

\_\_\_\_\_

(b) Full Name: \_\_\_\_\_

Residence (City): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_

Names & ages of children (your grandchildren): \_\_\_\_\_

\_\_\_\_\_

(c) **Full Name:** \_\_\_\_\_  
**Residence (City):** \_\_\_\_\_  
**Date of Birth:** \_\_\_\_\_  
**Name of Spouse:** \_\_\_\_\_  
**Names & ages of children (your grandchildren):** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**5. Other Living Relatives:**

Please list names and ages of any living parent of either spouse, and names and ages of brothers and sisters of either spouse. Identify which spouse unless obvious.

<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>City of Residence</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**6. Financial Information:**

<u>(a) Assets</u>	<u>Approximate Value</u>
(1) <b>Average cash balance</b> (including savings, deposit certificates, etc.)	\$ _____
(2) <b>Securities</b> (stocks, bonds, mutual funds, etc.)	\$ _____
(3) <b>Residence</b>	
Value	\$ _____
Less Mortgage	\$ _____
Equity	\$ _____
(4) <b>Other Real Estate</b>	
Value	\$ _____
Less Mortgage	\$ _____
Equity	\$ _____
(5) <b>Autos, Boats, or Planes</b>	\$ _____
(6) <b>Livestock</b>	\$ _____
(7) <b>Other assets of a personal nature</b> (including unusually valuable household furnishings, etc.)	\$ _____
(8) <b>Life Insurance on life of Husband:</b>	

<u>Insurance Company</u>	<u>Owner of Policy</u>	<u>Beneficiaries</u>		<u>Face Amount</u>
		<u>Primary</u>	<u>Contingent</u>	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**(9) Life Insurance on life of Wife:**

<u>Insurance Company</u>	<u>Owner of Policy</u>	<u>Beneficiaries</u>		<u>Face Amount</u>
		<u>Primary</u>	<u>Contingent</u>	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

(10) **Retirement Benefits.**

<u>Name of Plan</u>	<u>Who Covered</u>	<u>Beneficiaries</u>		<u>Amount</u>
		<u>Primary</u>	<u>Contingent</u>	

(11) **Inheritances.** If either Husband or Wife owns inherited property not previously listed, or expects to inherit any property, please give general description, source, and approximate value.

\_\_\_\_\_  
\_\_\_\_\_

(12) **Beneficial interests.** If either Husband or Wife is a trustee or beneficiary of any trust, or has any power with respect to any trust, or has any estate in property for life, please give a general description of circumstances and approximate value. Please provide a copy of the trust for review. \_\_\_\_\_

\_\_\_\_\_

(13) **Other business interests (partnerships, proprietorships, closely held corporations).** Please supply general information relating to ownership, nature, and value of business and any plans or arrangements relating to disposition of the interest of a deceased owner. Please provide a copy of any buy-sell agreement.

\_\_\_\_\_  
\_\_\_\_\_

(14) **Gifts.** If either Husband or Wife has at any time made gifts, including customary Christmas, birthday, or holiday gifts, in substantial amounts (in excess of \$1,000, for example), please indicate the dates, recipients, and values of such gifts, the general nature of the gift property, and whether Husband or Wife filed any United States gift tax returns in connection with such gifts. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(b) **Liabilities.**

(1) **Average accounts payable (monthly bills)** \$ \_\_\_\_\_

(2) **Any loans or debts other than those mortgages shown above - (describe)**

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

(Place an asterisk (\*) by any debt or mortgage which is covered by credit life insurance.)

**TOTAL LIABILITIES** \$ \_\_\_\_\_

**7. Disposition of Property**

(a) In general, describe the way Husband wants his property to pass upon his death (add additional pages, if necessary).

(1) If Wife survives Husband:

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(2) If Wife does not survive Husband:

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(3) If neither Wife nor children (or grandchildren) survive Husband:

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(4) Special provisions with respect to any specific properties?

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(b) In general, describe the way Wife wants her property to pass upon her death (add additional pages, if necessary).

(1) If Husband survives Wife:

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(2) If Husband does not survive Wife:

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(3) If neither Husband nor any children (or grandchildren) survive Wife:

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(4) Special provisions with respect to any specific properties?

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(c) If a trust is used for your children, at what ages and in what percentages should they receive the property in the trust? (Assume that their health, support, and education needs are provided for during the term of the trust.)

At age \_\_\_\_\_, distribute \_\_\_\_\_%; then at age \_\_\_\_\_, distribute \_\_\_\_\_% ; then at age \_\_\_\_\_, distribute the remainder.

Special distribution provisions: \_\_\_\_\_

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**8. Selection of Representatives:**

List below the name, relationship, and city of residence of the person (or the name and address of the bank) that you wish to have serve in the capacities indicated:

**(a) Husband's Will.**

- \* **Executor(s)** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_  
3rd Alternate \_\_\_\_\_
  
- \* **Trustee(s)** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_  
3rd Alternate \_\_\_\_\_
  
- \* **Guardian** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_

**B. Wife's Will.**

- \* **Executor(s)** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_
  
- \* **Trustee(s)** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_
  
- \* **Guardian** \_\_\_\_\_  
1st Alternate \_\_\_\_\_  
2nd Alternate \_\_\_\_\_

**9. Miscellaneous:**

If either Husband or Wife has a Will presently in existence, please indicate date and location. \_\_\_\_\_

If you have selected a bank to serve as executor or trustee, may we provide the bank a copy of the will and any trusts prepared? \_\_\_\_\_

**10. Additional Comments:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Husband's Signature

\_\_\_\_\_  
Wife's Signature