

ESTATE PLANNING DATA

Date: _____

Identification

Name: _____ Place of Birth: _____

Last Four of Social Security No: _____ Date of Birth: _____

US Citizen: Yes No e-mail: _____

Work Phone: _____ Cell Phone: _____

Spouse's Name: _____ Place of Birth: _____

Last Four of Social Security No: _____ Date of Birth: _____

US Citizen: Yes No e-mail: _____

Work Phone: _____ Cell Phone: _____

Home Address: (including County): _____

Home Phone: _____

Date of Marriage: _____

Do you have a Marital Property Agreement? Yes No (If so, please provide me with a copy.)

Children's Names, Addresses, Telephone Numbers, and Social Security Numbers

Dates of Birth

Child of H/W/Both

1.	_____ _____	_____	_____
2.	_____ _____	_____	_____
3.	_____ _____	_____	_____
4.	_____ _____	_____	_____
5.	_____ _____	_____	_____

If you have more than 5 children, please provide the above information on a separate page.

Estimated Value of Your Estate

\$ _____ Real Estate (residence, rental property, land, vacation homes, etc.)
\$ _____ Oil & gas interests
\$ _____ 401(k), pension plans, annuities, IRAs
\$ _____ Stocks/Bonds/Mutual Funds (not held in retirement accounts)
\$ _____ Cash/Savings
\$ _____ Household furnishings/personal effects/motor vehicles
\$ _____ Life Insurance
\$ _____ Business or partnership interests
\$ _____ Digital assets, including e.g. cryptocurrency and NFTs
\$ _____ Other (Describe: _____)
\$ _____ SUBTOTAL
\$ _____ Estimated Total Debts and Mortgages Owed
\$ _____ TOTAL

Do you own any property outside of Texas? Yes No
If yes, please describe (location, type, how held) _____

Have either you or your spouse inherited or do either of you expect to inherit any property? Yes No
If yes, please describe (location, type, how held) _____

Are either you or your spouse the creator or beneficiary of any trust? Yes No
If yes, please describe (trust name, date, trustee, grantor) _____

Your Fiduciaries

List below the name, address, and telephone number of each person (and/or the bank or trust company) that you wish to have serve in the fiduciary capacities indicated. The choices selected do not have to be the same for each of you. In addition, you may name two persons to serve jointly, you should name alternates, and you may name several alternates.

	<u>Husband</u>	<u>Wife</u>
Executor(s):	_____	_____
	_____	_____
Trustee(s):	_____	_____
	_____	_____
Guardian(s) for Minor Children:	_____	_____
	_____	_____
Agents for Incapacity:	_____	_____
	_____	_____

Disposition of Your Property

At our meeting, please plan to describe the way you want your property to pass at your death, keeping in mind any contingent beneficiaries you may want to include in the event the primary beneficiaries do not survive you.

1. Immediate Family Members: _____
2. Extended Family: _____
3. Charities: _____
4. Other: _____

Additional Identification of Family Members

	<u>Grandchildren's Names</u>	<u>Dates of Birth</u>	<u>Born to which Child of Yours</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____

Husband:

Please provide names of the following family members and, if living, indicate city, state, and country of residence:

Mother: _____
Father: _____
Brother(s): _____
Sister(s): _____

Wife:

Please provide names of the following family members and, if living, indicate city, state, and country of residence:

Mother: _____
Father: _____
Brother(s): _____
Sister(s): _____

Miscellaneous Information

Husband

Employer: _____
Position: _____
Address: _____
Phone: _____ Fax: _____
Military Service: Yes No If yes, give details (Branch, Dates of Service, Status): _____

Wife

Employer: _____
Position: _____
Address: _____
Phone: _____ Fax: _____
Military Service: Yes No If yes, give details (Branch, Dates of Service, Status): _____

If either of you have been married before, please furnish the following information as to each prior marriage:

1. Name of former spouse: _____
 2. Date and place of marriage: _____
 3. Date of termination of marriage and whether due to death or divorce: _____
 4. If either of you are subject to an ongoing obligation in favor of a former spouse, please describe and provide a copy of the divorce decree or other document. _____
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If either of you is a current or potential party to a lawsuit, please describe: _____

If either of you is a party to a buy-sell agreement with regard to any company, please describe and provide a copy of each agreement: _____

Do any potential beneficiaries of your estate receive governmental benefits or have any special needs or problems that should be addressed in your estate planning? Yes No (Plan to discuss when we meet.)

Other Estate Planning Advisors

Accountant: _____

Primary Personal Bank: _____

Stockbroker or other Investment Advisor: _____

Insurance Agent: _____