

**ESTATE PLANNING INFORMATION**

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

**PERSONAL INFORMATION**

Legal name:	Veteran:	Yes	No
Date of birth:	U.S. citizen:	Yes	No
Marital Status:	First marriage:	Yes	No
Date of marriage:			
Occupation:			
Telephone (home):	Email:		
Telephone (work):			
Telephone (cell):			

Spouse/partner name:	Veteran:	Yes	No
Date of birth:	U.S. citizen:	Yes	No
Marital Status:	First marriage:	Yes	No
Occupation:			
Telephone: (home):	Email:		
Telephone (work):			
Telephone (mobile):			

Address: (home): \_\_\_\_\_

Address: (mailing, if different): \_\_\_\_\_

May we communication with you by email?                      Yes                      No

How did you hear about Jarrett & Luitjens, PLC? \_\_\_\_\_

**FAMILY INFORMATION**

*Directions: list all children, if any (biological, adopted, or step); otherwise, list parents and/or siblings, as their names would appear on legal documents*

(1)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

(2)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

(3)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

(4)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

(5)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

(6)

Legal name:	Relation:
Address:	Birthdate:
	Date of death:
Telephone:	
Spouse:	First marriage?
Names/ages of children:	

**ASSET INFORMATION:** Please list each asset you own, whether individually, jointly with another, or in trust.

***Real Estate***

Property address:	
Owner(s):	
How titled:	
Purchase price:	Current value:
Year purchased:	Mortgage bal:
Since purchase, have you subdivided, added parcels, or adjusted boundaries?	

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***Bank Accounts***

<b>Owner</b>	<b>Name of Bank</b>	<b>Type</b>	<b>Beneficiary?</b>	<b>Balance</b>

<b><i>Safe Deposit Box?</i></b>	<b><i>Names on rental:</i></b>
<b><i>Box#:</i></b>	<b><i>Bank Name/location:</i></b>

**Retirement Accounts** (e.g., IRAs, 401(k)s, 403(b), SEP, but **NOT** pension income)

Owner	Financial institution	Type	Beneficiaries (primary/contingent)	Current value

**Non-qualified Investments** (e.g., stocks, bonds, mutual funds, brokerage accounts)

Owner	Financial institution	Type of investment	Current value

**Life Insurance/Deferred Annuities**

Insured /annuitant	Financial institution	Face/Cash value	Death benefit	Beneficiaries (primary/contingent)

**Automobiles/boats/motor homes**

Owner	Year/make/model	Loan balance	Current value

**Other Assets** (business interests, promissory notes, art, collectibles, valuable antiques)

Owner	Description	Current value

**SPECIAL CIRCUMSTANCES** – please indicate any special circumstances such as:

Family members with disabilities, pending divorces, child support obligations	
Any gifts or inheritances you anticipate receiving	
Other	

**OTHER ADVISORS:**

**CPA/Accountant:** \_\_\_\_\_

**Financial Advisor:** \_\_\_\_\_

**Other:** \_\_\_\_\_

List the family members with whom we may speak about this engagement:

\_\_\_\_\_

*I/We hereby certify that the information provided is complete and accurate to the best of my/our knowledge.*

Signature	Date



**ADDITIONAL INFORMATION**  
**For Long-term Care Planning Consultations**  
 (this information is **NOT** needed for traditional estate planning consultations)

Nursing or Residential Care Home: \_\_\_\_\_

Daily or monthly cost of care: \_\_\_\_\_

Long-term Care insurance benefit (if any): \_\_\_\_\_

**HOUSING EXPENSES**

<b>Real estate taxes (annual):</b>	<b>Insurance:</b>
<b>Mortgage/rent(monthly):</b>	<b>Condo/HOA:</b>

**HEALTH INSURANCE INFORMATION**

Type	Name	Premium
<b>Primary</b>		
<b>Supplemental</b>		
<b>Prescription</b>		
<b>Other</b>		

**INCOME INFORMATION**

Type	Client	Spouse/partner
<b>Wages</b> (gross figures)		
<b>Social Security</b> (gross before Medicare)		
<b>Pension</b> (gross)		
<b>Other</b>		

Any significant gifts you have made within 5 years: \_\_\_\_\_