

DATA SHEET
(Married Couple)

Husband _____ Birth Date _____ U.S. Citizen Yes No
 Previously Married Yes No Social Security No. _____
 Wife _____ Birth Date _____ U.S. Citizen Yes No
 Previously Married Yes No Social Security No. _____
 Do you have a Prenuptial Agreement? Yes No
 Address _____ City _____ State _____ Zip _____
 Email Address _____ Date Married _____
 Husband's Employer _____ Annual Salary _____
 Wife's Employer _____ Annual Salary _____

Home Phone _____	Husband's Work/Cell _____	Wife's Work/Cell _____
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	Children's Names	Sex M/F	Birth Date	This Marriage	Husband's Prior Marriage	Wife's Prior Marriage	Special Needs?
1.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						
2.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						
3.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						
4.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						
5.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						
6.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Occupation: _____						

Those children previously married: _____
 Accountant: _____ Referred by: _____

ANTICIPATED FAMILY INHERITANCES

Husband: None Amount \$ _____ Wife: None Amount \$ _____

FINANCIAL INFORMATION

DESCRIPTION OF ASSETS	JOINT	HUSBAND	WIFE	TOTAL
Residence (less mortgage)				
Other Real Estate (net of mortgages)				
Stocks, Bonds and Mutual Funds				
Cash in Banks				
Business Interests*				
Notes Receivable				
Vehicles and Boats				
Furniture and Furnishings				
Personal Effects				
Retirement Plans (vested amount)				
Individual Retirement Accounts (IRAs)				
Non-Qualified Annuities				
Limited Partnerships				
Other Assets				
TOTALS				

*** BUSINESS INFORMATION**

Name: _____

Business Net Value: \$ _____

Number of Employees: _____

Buy-Sell Agreement Exists:

Yes No

FORM OF BUSINESS

- Sole Proprietorship
- Partnership
- LLC
- C Corporation
- S Corporation
- Professional Corp.

BUSINESS VALUATION METHOD

- Client Estimate
- Net Book Value
- Buy-Sell Agreement
- Other _____.

BUSINESS STATUS AT DEATH

- Continued by Heirs
- Sold to Surviving Owners
- Sold to Key Persons
- Liquidated

LIFE INSURANCE

COMPANY	INSURED	OWNER	BENEFICIARY	FACE AMOUNT	ANNUAL PREMIUM

We certify that the financial information provided above is accurate as of _____, and we acknowledge that if it is not, the estate planning advice given us may be inappropriate.

Husband's Signature

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Wife's Signature