

**DATA SHEET**  
(Single Person)

Name \_\_\_\_\_ Birth Date \_\_\_\_\_ U.S. Citizen  Yes  No

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-Mail Address \_\_\_\_\_ Employer \_\_\_\_\_

Social Security No. \_\_\_\_\_ Annual Salary \_\_\_\_\_

If you have children, is the child's other parent living?  Yes  No  N/A

**TELEPHONE NUMBERS**

\_\_\_\_\_ Home Phone

\_\_\_\_\_ Work Phone

\_\_\_\_\_ Cell Phone

	Children's Names	Sex M/F	Birth Date	Special Needs?
1.				<input type="checkbox"/>
2.				<input type="checkbox"/>
3.				<input type="checkbox"/>
4.				<input type="checkbox"/>
5.				<input type="checkbox"/>
6.				<input type="checkbox"/>

Accountant: \_\_\_\_\_ Referred by: \_\_\_\_\_

**ANTICIPATED FAMILY INHERITANCES**

None Amount \$ \_\_\_\_\_

## FINANCIAL INFORMATION

DESCRIPTION OF ASSETS	AMOUNT
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	
<b>TOTAL</b>	

**\* 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

Are you currently a beneficiary under any irrevocable trust? \_\_\_\_\_ Yes \_\_\_\_\_ No

**LIFE INSURANCE**

COMPANY	INSURED	OWNER	BENEFICIARY	FACE AMOUNT	ANNUAL PREMIUM

I certify that the financial information provided above is accurate as of \_\_\_\_\_, and I acknowledge that if it is not, the estate planning advice given to me may be inappropriate.

\_\_\_\_\_  
Signature

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