

CARNAHAN, EVANS, CANTWELL & BROWN, P.C.

PERSONAL DATA FOR ESTATE PLANNING

In order to answer your questions, properly advise you, and maximize the use of your time, the following information will be needed. Please fill out every applicable question. If you are uncertain about any information, please give your best estimate.

THIS INFORMATION WILL BE KEPT CONFIDENTIAL!

Today's Date: _____

YOU: _____
(Last) (First) (Middle)

PRESENT ADDRESS: _____
(Street and/or Apartment Number)

(City) (County) (State) (Zip Code)

HOME PHONE NO. _____ BUSINESS PHONE NO. _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: ____ / ____ / ____ (_____) Age

OCCUPATION: _____

BUSINESS ADDRESS: _____

* * * * *

YOUR SPOUSE: _____
(Last) (First) (Middle) (Maiden)

HOME PHONE NO. _____ BUSINESS PHONE NO. _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: ____ / ____ / ____ (_____) Age

OCCUPATION: _____

BUSINESS ADDRESS: _____

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If you are now married, date of your marriage:

Where? _____
(City) (County) (State)

Were you or your spouse married previously? ___ Yes ___ No. If yes, please indicate which of you was previously married, whether the marriage(s) ended by reason of death or divorce and the date, and provide any information which might have a bearing on your estate plan, for example, a requirement you maintain insurance on your life for a former spouse.

* * * * *

For each of your children (including adopted children), give the information requested, listing the oldest child first. If born of a prior marriage, indicate which one.

NAME	DATE OF BIRTH	SOC. SEC. NUMBER	ADOPTED ?	? BORN OF PRIOR MARRIAGE	MARRIED ?

Are there any special considerations or problems, your's or a child's, such as health, marital, financial dependency? If so, please detail.

* * * * *

RELEVANT DOCUMENTS

Do either of you presently have a will? ___ Yes ___ No.

A trust? ___ Yes ___ No.

Given a power of attorney? ___ Yes ___ No.

Have you executed a pre-nuptial or post-nuptial agreement? ___ Yes ___ No

Have you a settlement agreement with a prior spouse, or a court decree, involving division of property, support, etc.? ___ Yes ___ No.

Where are the originals of the documents located:_____.

If this office did not prepare the documents, please provide copies.

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GENERAL INFORMATION

Advisors - Give names and addresses

Accountant:_____

Bank Contact:_____

Life Insurance Agent:_____

Investment Broker:_____

Physician(s):_____

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Veteran - Indicate which spouse, service number, any service disability

Pension? Yes No. Beneficiary(s): _____

Safe Deposit Box - Do you have? Yes No. If so, which bank (s)

Name(s) on lease: _____

Deputies, if any: _____

Gifts - Have you made gifts to anyone of property, including cash, by direct gift, by creating a joint tenancy, or by creating a trust? Yes No.

If yes, did the amount of gifts to any one person in any calendar year:

(1) Total \$3,000 or more for any year 1977 through 1981? Yes No.

(2) Total \$10,000 or more for any year after 1981? Yes No.

(3) Involve a life insurance policy of any value? Yes No.

(4) Get reported on a gift tax return? Yes No.

If "Yes" to any question, please give detail and attach copies of any gift tax return(s).

Nearest Living Relatives - Parents, brothers and sisters, etc. Give names, relationship, address:

You: _____

Spouse: _____

Community Property - During your marriage, did you ever reside in a community property state (AZ, CA, ID, LA, NV, NM, TX, WA, WI)? Yes No. If so, give detail concerning when (dates), and any property acquired while living there which you still have:

Other Benefits - Are there any other benefits which you have, or expect to have, which should be considered, such as inheritance, trusts for you, civil service, etc.? If so, list whose benefit and briefly describe:

* * * * *

PROPERTY

All property owned by you and your spouse, or in which either or both of you have an interest, must be considered. The following pages provide for information on various types of property. Please provide as much information as possible, particularly the values. List the value under the appropriate column based on ownership. For example, if the residence has a value of \$50,000 and is jointly titled, put the \$50,000 value in the "Joint" column, nothing in "You" or "Spouse" column; or, if each of you own stock in your name, put the values in each applicable column. If there is not enough space, add pages or use the back of pages.

I. REAL ESTATE

List all kinds -- vacant land, houses, commercial, etc.

	V A L U E		
	You	Spouse	Joint
1. Address:	\$	\$	\$
Mortgage(s):	(\$)	(\$)	(\$)
2. Address:	\$	\$	\$
Mortgage(s):	(\$)	(\$)	(\$)
3. Address:	\$	\$	\$
Mortgage(s):	(\$)	(\$)	(\$)

II. MOTOR VEHICLES

Include all autos, boats, trailers, aircraft, recreational vehicles, campers, motorcycles, etc.

V A L U E

	You	Spouse	Joint
1. Year, make & model:	\$	\$	\$
Loan(s):	(\$)	(\$)	(\$)
2. Year, make & model:	\$	\$	\$
Loan(s):	(\$)	(\$)	(\$)
3. Year, make & model:	\$	\$	\$
Loan(s):	(\$)	(\$)	(\$)

III. BANK ACCOUNTS

Include all types of "cash" accounts, such as checking and savings accounts, certificates of deposit, credit union, etc.

VALUE

	You	Spouse	Joint
1. Checking Accounts:	\$	\$	\$
	\$	\$	\$
2. Savings, CDs, Credit Unions:	\$	\$	\$
	\$	\$	\$
3. Others:	\$	\$	\$
	\$	\$	\$

IV. SECURITIES

Include all stock (both public and closely held), bonds, promissory notes, mortgages, money market funds and other similar property in which you have any interest.

	VALUE		
	You	Spouse	Joint
1. Securities On Listed Exchanges:	\$	\$	\$
2. Closely Held Stocks:	\$	\$	\$
Name Of Company:	\$	\$	\$
	\$	\$	\$
3. Money Market Accounts:	\$	\$	\$
	\$	\$	\$
4. Others:	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

V. RETIREMENT, PENSION, PROFIT SHARING, IRAs

For value, give the amount actually in the plan.

Name of Company and of Plan	V A L U E		
	You	Spouse	Beneficiary
1.	\$ _____	\$ _____	\$ _____
2.	\$ _____	\$ _____	\$ _____
3. IRA Accounts:	\$ _____ \$ _____	\$ _____ \$ _____	\$ _____ \$ _____

VI. LIFE INSURANCE

Include all policies even if there is no value, including insurance through your employer. Place face amount (amount payable at death) in column of owner.

	F A C E V A L U E	
	You	Spouse
1. Company: _____ \$ _____	\$ _____	\$ _____
Type Of Policy:		
Insured:		
Beneficiary(ies):		
2. Company: _____ \$ _____	\$ _____	\$ _____
Type Of Policy:		
Insured:		
Beneficiary(ies):		

3. Company: _____ \$ _____ \$

Type Of Policy:

Insured:

Beneficiary(ies):

4. Company: _____ \$ _____ \$

Type Of Policy:

Insured:

Beneficiary(ies):

VII. BUSINESS INTERESTS

Include any interest in sole proprietorships, partnerships, joint ventures or other non-corporate businesses.

		You	VALUE Spouse	Joint
1. Name: _____	\$ _____	\$ _____	\$ _____	

Address:

Type Of Business:

Ownership Interest:

2. Name: _____	\$ _____	\$ _____	\$ _____	
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Address:

Type Of Business:

Ownership Interest:

VII. HOUSEHOLD & PERSONAL GOODS; OTHER ASSETS

Include all furniture, household goods, personal effects and similar items as one amount. List any antiques, gun collection, coin or stamp collection, etc., separately if of significant value. List any other asset which has a significant value.

		You	V A L U E Spouse	Joint
1. Household Goods, Furniture, Personal Effects, Etc.		\$ _____	\$ _____	\$ _____
2. _____	\$ _____	\$ _____	\$ _____	
3. _____	\$ _____	\$ _____	\$ _____	
4. _____	\$ _____	\$ _____	\$ _____	
5. _____	\$ _____	\$ _____	\$ _____	

YOUR ESTATE PLANS

The most important part of our work is insuring that your plans and desires are carried out. Your thoughts and plans, both generally and specifically, are of utmost importance.

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In general terms, who should receive your property and on what terms (outright, in trust, other):

If you have minor children, who would you prefer to act as guardian if both parents are deceased:

Who should serve as Personal Representative of your estate and as backup(s):

Who should serve as Trustee and backup(s) for any trusts:

Most people have certain items of their property they want to leave to certain individuals. Items of personal property (jewelry, china, guns, etc.) can be handled by a list separate from the will or trust. What items, if any, do you want to give to specific persons under your will or trust:

If any of these items are subject to a debt, is the debt to be paid by the recipient or your estate:

If any estate or inheritance taxes are due, should those be paid by the persons receiving your property or by your estate:

Do you have any money amounts you want given to others (individuals or charities):

Other Thoughts: _____

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