HICKS, MILLBROOK & CWAYNA, PLLC
ATTORNEYS • COUNSELORS AT LAW

Estate Planning Client Information Record

Confidential Personal Information for Estate Planning

Date of Consultation:____

Individual	*Husband*	*Wife*
Name	____________________	____________________
Also known as	____________________	____________________
Social Security no.	____________________	____________________
Birth Date	____________________	____________________
U.S. Citizen	_____ Y _____ N	_____ Y _____ N
Living Parents	____________________	____________________
Former Spouse	____________________	____________________
Business Address	____________________	____________________
Telephone no.	____________________	____________________
Fax Number	____________________	____________________
Email address	____________________	____________________
Home address	____________________	____________________
County of residence	____________________	____________________
Date of marriage	____________________	____________________

Children

Living children (indicate children from prior marriages and adopted children)

Name	*Birth date*	*Social Security no.*	*No. of children*
____________________	__________	________________	___________
____________________	__________	________________	___________
____________________	___________	_____________________	___________
____________________	___________	_____________________	___________
____________________	___________	_____________________	___________
____________________	___________	_____________________	___________
____________________	___________	_____________________	___________

Deceased children ____

Living children of deceased children ____

Note: If there are no living children or grandchildren, list the brothers and sisters (living and deceased) of the husband and wife.

Agents and brokers

Safe deposit box	____ Y ____ N	Location ____________________________
Accountant	____ Y____ N	Name _______________________________
Insurance Agent	____ Y ____ N	Name _______________________________
Stockbroker	____ Y ____ N	Name _______________________________
Financial Planner	____Y _____ N	Name_______________________________

Real Estate (including land contracts)

Description (include owner): H – husband, W – wife, J – joint)	*Mortgage Balance*	*Market Value*
______________________________	$_______________	$__________________
______________________________	$_______________	$__________________
______________________________	$_______________	$__________________
______________________________	$_______________	$__________________

Cash (checking, savings, CD, money market, credit union)

Location of account (include owner: H, W, J)	Amount
__________________________________	$____________________
__________________________________	$____________________
__________________________________	$____________________
__________________________________	$____________________

Stocks and bonds (if in brokerage account, list firm name)

Listed Securities (H) ____

Listed Securities (W) ____

Listed Securities (J) ____

Closely held (family) securities ____

Business interests (include closely held corporations, limited liability companies, general partnerships, limited partnerships, proprietorships, etc., in which you have an interest – include ownership (H,W,J)

Life Insurance (include insured, insurance company, insurance type, owner, and beneficiary)	*Face amount*
	$_______________
	$_______________
	$_______________
	$_______________

Retirement Benefits (list company)

____

IRA (list locations, type [Roth, non-Roth], and amount)

____

____

Miscellaneous

Household furnishings, autos, collections

____

Money owed by others to you

____

Miscellaneous (trusts, etc.)

____

Expected inheritances

____

List all gifts made by you over $3000 in value (date and beneficiary)

____

____

Any gift tax return filed ________Y ________ N Years filed

____

List significant debts or obligations other than mortgages listed above

____

____