

CLIENT ESTATE DISPOSITION INFORMATION

Your Full Legal Name:

Social Security Number:

Date of Birth:

Address of Residency:

Home phone number:

Cell phone number:

Email:

Marital Status-(Circle one): Single Married Divorced Widowed

If married, spouse's name:

Spouse's social security number:

Spouse's date of birth:

***If you have a (pre or post) nuptial agreement, provide a complete copy to our office for your file.**

Were you ever married before: YES NO If yes, former spouse's name:

Did your former spouse DIE or did you obtain a DIVORCE?? (**circle one**)

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Do you have any living children: YES NO If yes, what are their names, dates of birth, addresses and #:
(if any were adopted, provide a copy of the Court Order)

If any of your children are minors, who would you nominate as Guardian and Alternate Guardian?
names their relationship to you addresses phone #:

Do you own any real estate (including your residence): YES NO
(if yes, please bring copies of all deeds to our office for your file)

What is the address and approximate market value of the each property:

Is there a mortgage (including equity line) on the real estate? YES NO

Who is the borrower?

Do you have a safe deposit box: YES NO

If yes, what is the box # _____

Name and location of bank:

Who has access to the box:

Do you have bank or credit union accounts (savings, checking, CD, MMA, retirement or brokerage account):

YES NO If yes, how are each one titled?

Do you have life insurance: YES NO

Name of company(s): Policy # Face value \$ Beneficiary Policy Owner

Do you have any other assets of value not listed above, including any current debts owed to you?

If so, please list:

Have you made arrangements for the disposition of your remains? YES NO

If yes, with whom: name address phone #

In your words, describe how your property will be distributed and to whom (please include the relationship of the beneficiary to you and their address and phone number, if not listed above):

Who are your choices for Personal Representatives (formerly known as Executor)?

Name	Relationship	Address	Phone #
1.			
2.			
3.			

BE SURE TO MAKE A LIST OF ALL INTERNET ACCOUNTS (banking, social media, etc.), INCLUDING YOUR USER ID AND PASSWORDS TO PROVIDE TO A TRUSTED PERSON UPON YOUR DEATH.