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A PROFESSIONAL CORPORATION

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INFORMATION FOR ESTATE AND TAX PLANNING

DATE:______________________________

PERSONAL INFORMATION

Husband's Name:_________________________

Wife's Name:_________________________

Home Address: (include county and township or borough)

____

____

Home Phone: _________________________

Home Fax: _________________________

Home E-Mail: _________________________

Husband	**Wife**
Social Security No. _______________	Social Security No._______________
Date of Birth:_______________	Date of Birth:_______________
Place of Birth:_______________	Place of Birth:_______________
Citizenship:_______________	Citizenship:_______________
Business Address:	Business Address:
_______________	_______________
_______________	_______________
Business Phone:_______________	Business Phone:_______________
Business Fax:_______________	Business Fax:_______________
Business E-mail:_______________	Business E-mail:_______________

YOUR PARENTS (If deceased, please provide dates of death)

Husband's Parents	Wife's Parents
Names: ______________________	Names: ______________________
______________________	______________________
Address: ______________________	Address: ______________________
______________________	______________________

YOUR CHILDREN

	Date of Birth Month Day Year	Address & SSN if Applicable [1]
1. Name: ____________	____________	____________
Spouse: ____________	____________	____________
Children: ____________	____________	____________
____________	____________	____________
2. Name: ____________	____________	____________
Spouse: ____________	____________	____________
Children: ____________	____________	____________
____________	____________	____________
3. Name: ____________	____________	____________
Spouse: ____________	____________	____________
Children: ____________	____________	____________
____________	____________	____________
4. Name: ____________	____________	____________
Spouse: ____________	____________	____________
Children: ____________	____________	____________
____________	____________	____________
5. Name: ____________	____________	____________
Spouse: ____________	____________	____________
Children: ____________	____________	____________
____________	____________	____________

Clearly identify any children that are not children of both spouses, such as a child one of you had from a former marriage.

[1] Include address and social security numbers of family members if gifting program in place or anticipated.

FINANCIAL INFORMATION

Name(s) and telephone number(s) of accountant and/or other financial advisor, if any:

____

____

____

Estimated annual income: Husband: ______________ Wife: ______________

Have you, or anyone else, established any separate fund for your children, grandchildren or other beneficiaries (e.g., UTMA acct, 529 plan account)? If so, please provide a description of each account, and the account owner, account beneficiary, custodian and value for each account (Ex: Trusty Invest Co.-UTMA for John Doe- $15,000, Custodian- Jane Doe):

1. ____
2. ____
3. ____

	YES	NO
Do you or your spouse receive income from, or does either of you have any present or future interest in a trust? If so, please provide a copy of the trust instrument, if available.	___	___
Do you or your spouse expect to receive a significant inheritance in the foreseeable future from a family member or other individual? If so, please explain and provide expected value.	___	___
Have you or your spouse created a trust (2503(c)) trust, life insurance trust, etc.)? If so, please provide a copy of the trust instrument, if available.	___	___
Did you or your spouse make a gift of more than $3,000 prior to December 31, 1976? If yes, please describe.	___	___
Did you or your spouse make a gift of more than $3,000 (or gifts that totaled more than $3,000) to any one recipient in any year after December 31, 1976? If yes, please describe.	___	___
Have you or your spouse ever filed one or more federal gift tax returns? If so, please provide copies of the returns, if available.	___	___
Do you or your spouse own any property jointly with someone other than your spouse? If so, please describe.	___	___
Do you or your spouse own any stock in a subchapter "S" corporation? If so, please describe.	___	___
Do you or your spouse have a pre-nuptial or post-nuptial agreement? If so, please provide a copy.	___	___
Have either you or your spouse been previously married? If so, please provide their name(s):______________________________.	___	___
Do either you or your spouse have any financial obligation to a former spouse or to children? If so, please describe.	___	___
Do you and your spouse have adequate liability insurance, including an umbrella policy?	___	___

ASSETS

It is important for us to know both the nature and the value of your assets, as well as the ownership as between spouses. Please insert in the appropriate column simple descriptions and approximate values of your assets. If any of the assets have a beneficiary designation ("POD" account, "TOD" account, "In Trust For" account, IRA, 401(k) etc.), please also identify the current beneficiary after the value of the asset. For example:

"First National Bank savings account - $10,000"
"Jewelry - $5,000"

"Trustworthy Investments-IRA- $300,000 (beneficiary-spouse)"
"Vacation home - Avalon, NJ - $100,000"

Description	Owned by Husband	Owned by Wife	Jointly Owned (H-W)
Automobiles, furniture, personal effects			
Cash			
Marketable stocks and bonds			
Stock in closely held corporations, partnerships, other business interests			
Real estate (include location) 1.________________ (Residence) 2.________________ (Vacation home) 3.________________			
Pensions; Retirement Plans; Death Benefits; IRAs; Roth IRAs; 401(k)s (include beneficiary for each account)			
Other Assets (Describe): 1.________________ 2.________________ 3.________________			
Total			

LIFE INSURANCE

Face Amount	Name of Company	Type (Ordinary Life; Term)	Policy Owned By	Present Beneficiaries	Policy Loans (if any) and Cash Value (if any)
On Husband's Life:					
1. ____________	________	________	________	________	________
2. ____________	________	________	________	________	________
3. ____________	________	________	________	________	________
On Wife's Life:					
1. ____________	________	________	________	________	________
2. ____________	________	________	________	________	________
3. ____________	________	________	________	________	________
Owned by either Husband or Wife on another's life:					
1. ____________	________	________	________	________	________
2. ____________	________	________	________	________	________

LIABILITIES

Description	Husband	Wife	Joint
Mortgage(s) (State amount outstanding and payee):			
Loans Payable (State amount outstanding and payee):			
Other Liabilities (Describe):			
Total			