HECKSCHER, TEILLON, TERRILL & SAGER
A PROFESSIONAL CORPORATION

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INFORMATION FOR ESTATE AND TAX PLANNING

DATE:______________________________

PERSONAL INFORMATION

Name:______________________________

Home Address: (include county and township or borough)

____

____

Home Phone_________________________

Home Fax:___________________________

Home E-mail:________________________

Business Address:

____

____

Business Phone:_______________________

Business Fax:_______________________

Business E-mail:____________________

Social Security No.:____________________

Date of Birth:_________________________

Month Day Year

Place of Birth:________________________

Citizenship:___________________________

YOUR PARENTS

Names: ______________________________

If deceased, dates of death: ______________________________

Address: ______________________________

YOUR CHILDREN

	Date of Birth Month Day Year	Address & Soc. Sec. # if Applicable [1]
1. Name: ________	________	________
Spouse: ________	________	________
Children: ________	________	________
________	________	________
2. Name: ________	________	________
Spouse: ________	________	________
Children: ________	________	________
________	________	________
3. Name: ________	________	________
Spouse: ________	________	________
Children: ________	________	________
________	________	________
4. Name: ________	________	________
Spouse: ________	________	________
Children: ________	________	________
________	________	________
5. Name: ________	________	________
Spouse: ________	________	________
Children: ________	________	________
________	________	________

[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:______________________

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. ____

	YES	NO
Do you receive income from, or have any present or future interest in a trust? If so, please provide a copy of the trust instrument, if available.	______	______
Do you 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 created a trust (2503(c) trust, life insurance trust, etc.)? If so, please provide a copy of the trust instrument, if available.	______	______
Did you make a gift of more than $3,000 prior to December 31, 1976? If yes, please describe	______	______
Did you make a gift of more than $3,000 to any one recipient in any year after December 31, 1976? If yes, please describe.	______	______
Have you ever filed federal one or more gift tax returns? If so, please provide copies of the returns, if available.	______	______
Do you own any property jointly with anyone? If so, please describe.	______	______
Do you own any stock in a subchapter "S" corporation? If so, please describe.	______	______
Do you have a pre-nuptial or post-nuptial agreement? If so, please provide a copy.	______	______
Have you been previously married?	______	______
Do you have any financial obligation to a former spouse or to children? If so, please describe.	______	______
Do you 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. 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 Bank savings account - $10,000"
"Jewelry - $5,000"
"Vacation home, Avalon, NJ - $100,000"
"Trustworthy Investments - IRA - $300,000 (beneficiary - child)"

Description	Value
Automobiles, furniture, personal effects	
Cash	
Marketable stocks and bonds	
Stock in closely held corporations, partnerships, other business interests	
Real Estate (Include location) 1. 2. 3.	
Pensions; Retirement Plans; Death Benefits; IRAs; Roth IRAs; 401(k)s (include beneficiary for each account)	
Other Assets (Describe): 1. 2. 3. 4.	
Total	

LIABILITIES

Description	Value
Mortgage(s) (State amount outstanding and payee)	
Loans Payable: (State amount outstanding and payee)	
Other Liabilities (Describe): 1. 2. 3. 4.	
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)
Policies on My Life:					
1.__________	__________	__________	__________	__________	__________
2.__________	__________	__________	__________	__________	__________
3.__________	__________	__________	__________	__________	__________
4.__________	__________	__________	__________	__________	__________
Policies Owned by Me on Another's Life:					
1.__________	__________	__________	__________	__________	__________
2.__________	__________	__________	__________	__________	__________
3.__________	__________	__________	__________	__________	__________
4.__________	__________	__________	__________	__________	__________