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**CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE
FOR A MARRIED COUPLE**

Date: _____

Please print or write legibly the following information. If you need more space, use another sheet. If you are not certain about an answer, leave the space blank. Please bring this questionnaire with you, or mail it to me, together with copies of relevant deeds, insurance policies, divorce/dissolution judgments, marital agreements, etc. at the time of your appointment.

Home address: _____

Telephone Nos.: Day _____ Husband Cell _____ Wife Cell _____

Information on Husband

Name (first, middle, last): _____

Name as you sign it: _____

Business name, address and telephone: _____

Date and place of birth: _____

Social security number: _____

Are you a U.S. citizen? Yes ___ No ___

Date you came to California: _____

Children of this marriage:

(Child 1) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 2) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 3) Full name: _____ DOB: _____ Tel: _____

Address: _____

Husband's children of prior marriages:

(Child 1) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 2) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 3) Full name: _____ DOB: _____ Tel: _____

Address: _____

If you have any deceased children, please list below:

<u>Name</u>	<u>Date of Death</u>	<u>Names of deceased child's children</u>
_____	_____	_____
_____	_____	_____

Names and address of parents (if living):

Do you have any support obligation to your parents? _____

Names and addresses of brothers and sisters (if living):

List amount of any gifts or inheritances you expect to receive from parents and others, describing from whom and approximate amount:

Describe any beneficial interests you have in a trust established by some other person; describe any powers you have to designate who receives irrevocable trust property at your death:

If you are a custodian of property (under the California Uniform Transfers and Minors Act or otherwise), or a trustee of property for the benefit of your children or others, please describe:

Please list any substantial gifts (over \$10,000 per year) you have made to children or others:

Use space below to include information that does not fit in the previous portion of this Questionnaire.

Information on Wife

Name (first, middle, last): _____

Name as you sign it: _____

Business name, address and telephone: _____

Date and place of birth: _____

Social security number: _____

Are you a U.S. citizen? Yes ___ No ___

Date you came to California: _____

Wife's children of prior marriages:

(Child 1) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 2) Full name: _____ DOB: _____ Tel: _____

Address: _____

(Child 3) Full name: _____ DOB: _____ Tel: _____

Address: _____

If you have any deceased children, please list below:

<u>Name</u>	<u>Date of Death</u>	<u>Names of deceased child's children</u>
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_____	_____	_____
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Names and address of parents (if living):

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Confidential Asset List

As of _____ (Date)

1. **Real estate:** For each parcel, please list:

Property address Lender name & address Loan number	Property type	Value	Loan amount	Record title
EXAMPLE:				
123 Main Street, Orange, CA Bank of America 456 Orange St. Santa Ana, CA 92111 #66-123-4567	personal residence	\$350,000	\$150,000	joint tenancy

2. **Promissory notes owed to you**

Name of person who owes you \$	Secured? (Yes or No)	Amount owed to you	How is title held?

3. **Publicly Traded Securities** (stocks, bonds, partnerships)

Name of corporation or partnership	Value	Loans outstanding	How is title held?

4. **Private (closely held) business interests**

Name of entity	Value of your interest	Is there a buy-sell agreement?	How is title held?

5. **Employee Benefits** (pension plan, profit sharing plan, IRA, 401(k), 403(b), etc.)

Employer	Type of plan (Pension/Profit Sharing/IRA)	Name of employee	Name of beneficiary	Present value

6. **Cash/cash equivalents** (checking accounts; certificates of deposit, money market accounts, etc.)

Name of institution	Type of account	How is title held?	Amount

7. Automobiles, boats and other vehicles

Year	Make	Present value	Loans owed	How is title held?

8. Furniture, furnishings, jewelry collections, etc.

General description	Value

9. Life insurance policies

Name of company	Policy number	Name of insured	Name of owner	Name of beneficiary	Face value	Loans owed

10. Other assets

Description	Value

