

**ESTATE PLANNING PERSONAL DATA FORM
FOR INITIAL CONSULTATION**

Current Domicile/Residence:

Name: _____ Date: _____

Residence Address: _____

City/State/Zip code: _____ County: _____

Township: _____ Property Tax ID _____

Mailing Address, if different: _____

Home Phone: () _____ Cell phone: () _____

Work Phone: () _____ E-mail address: _____

List any other states where you own property: _____

Personal Information:

Name as it appears on Birth Certificate: _____

Name as you sign it: _____

Social Security #: _____ Date of Birth: _____

Other names you have gone by: _____

Place of Birth: _____ U.S. Citizen: Yes ___ No ___

Husband's/Wife's full name: _____

Date of His/Her birth/death _____ Date of death _____

Date/Place of marriage: _____

Documents to bring in:

Any prior wills, trusts, POAs, etc.

Deed to home and to other real property, no matter where located.

List of investment assets (or recent monthly or quarterly report showing assets).

Any Annuity Contracts and Life Insurance Policies in effect.

Titles to any other titled assets

List of untitled assets of significance.

Any judgments of divorce and any prenuptial/post-nuptial agreements.