

Information Regarding The First Meeting

At an initial meeting to discuss estate planning, we will explain some of the primary considerations including federal estate and gift tax laws and the various types of estate plan documents which are generally included in a complete estate plan. Some of the essential documents and issues to be discussed include probate, the difference between a will and a trust, various types of trusts used for different purposes, and durable powers of attorney for both financial and health care purposes. The initial meeting is typically 60-90 minutes in length and is without cost or other obligation to the client.

The following is an outline of the basic information that we will need to begin work on a client's estate plan. Experience has taught us that too much valuable time can be lost during an initial conference obtaining information about the client and his or her family. It is for this reason that we ask new clients to complete this form to the best of their ability and have it with them at the time of an initial meeting. Naturally, some of these questions will require discussion for a fuller understanding. We simply request that the answers be completed to the extent possible before the initial meeting.

Please be assured that all of this information is kept in the strictest confidence, knowing full well how personal and private the information provided will be. The purpose of these inquiries is to provide clients with the best possible service.

CONFIDENTIAL INFORMATION

- Please:
- (1) Print the following information;
 - (2) Use another sheet if you need more room;
 - (3) Leave the space blank if you are not certain;
 - (4) Write "NONE" if it is the appropriate answer.

1. Husband's full name: _____

Other or former names: _____

2. Wife's full name: _____

Other or former names: _____

3. Occupation of husband: _____

Occupation of wife: _____

4. Address and telephone: Phone: (H) _____ (B) _____

Home: _____

Business: _____

5. Date of Husband's birth: _____ Birthplace: _____

6. Is husband a U.S. citizen? _____ Yes _____ No

7. Date husband came to California: _____

8. Date of wife's birth: _____ Birthplace: _____

9. Is wife a U.S. citizen? _____ Yes _____ No

10. Date wife came to California: _____

11. Date of marriage: _____ Place: _____

Have you continuously resided in California since your marriage?

Yes (_____) No (_____)

If not, where and when: _____

12. Children of this marriage:

Name	Birth Date	Address if not yours
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

13. Have either you or your spouse been married before?
Yes (_____) No (_____)

Do either you or your spouse have children by a prior marriage?
Yes (_____) No (_____)
If YES, please show on a separate sheet.

14. Deceased children: _____

15. Spouses of children:

Name of child

Name of spouse of child

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

16. Grandchildren:

Name of grandchild

Age

Name of parent

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

17. Living parents of you or your spouse:

Husband's living parents:

Name

Address

Wife's living parents:
Name _____ Address _____

18. Brothers and sisters:

Husband's brothers and sisters:
Name _____ Address _____

Wife's brothers and sisters:
Name _____ Address _____

19. Social Security Number:

Husband: _____ Wife: _____

20. Location of safe deposit box: _____

21. Who has access to box: _____

22. Do you and your spouse have present wills: Yes (___) No (___)
If you have copies, please bring them to our office with this form at the time of your conference.

23. QUESTIONS TO BE ANSWERED:

Do you or your spouse:
(a) Expect to inherit something from parents or others:

Yes (___) No (___)

- (b) Expect to receive benefits from a retirement plan:
Yes (___) No (___)
- (c) Have power of appointment? Yes (___) No (___)
- (d) Expect to receive gifts from parents or others?
Yes (___) No (___)
- (e) Have beneficial interests in trusts? Yes (___) No (___)
- (f) Have interest in a buy-sell agreement? Yes (___) No (___)
- (g) Is all your property community property? Yes (___) No (___)
- (h) Does the husband own separate property? Yes (___) No (___)
- (i) Does the wife own separate property? Yes (___) No (___)

24. Life Insurance:

- (a) Total coverage of all policies on husband's life:
\$ _____
- (b) Total coverage of all policies on wife's life:
\$ _____
- (c) If policies are available, bring them with you at the time of your appointment. If policies are not available bring information which for each policy, shows:
 - 1. Name of company:
 - 2. Name of agent:
 - 3. Number of policy:
 - 4. Name of beneficiary:
 - 5. Owner of policy:
 - 6. Total amount of proceeds:

25. (a) Prior to January 1, 1982 did you make any gifts totaling more than \$3,000 in one calendar year to any person? Yes (____) No (____)
- (b) After December 31, 1981, did you make any gifts totaling more than \$10,000 in one calendar year to any person? Yes (____) No (____)
26. It would be helpful if you would provide us with a list of the assets and estimated fair market values of those assets as of this date. Please complete the attached asset list identifying the various assets, value, and identity of the owner listed on the title to each asset. If possible, please bring copies of the deeds to real property at the time of our meeting.

Although helpful, it is not necessary to have all of the above information and documents available at the time of the first meeting. Please contact our office by telephone if you would like to schedule an initial meeting to discuss your estate plan.