SPECIAL NEEDS
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CONFIDENTIAL CLIENT DATA FORM – ESTATE PLANNING

DATE____/____/____

Client1 Name:____

Client2 Name:____

LIST OF ASSETS

We do not ask for this information to be nosy. We ask for this information because we cannot do our job properly without it. Many types of property require special consideration in estate planning, and your overall asset picture combined with your goals can greatly influence your estate plan. Please show current fair market value unless otherwise indicated. List ownership under Client1 if owned by Client1; Client2 if owned by Client2; and Joint ("J") if owned by Client1 and Client2 jointly. If the property is held by Client1 and/or Client2 with someone else, or is held in some way not listed below, put an asterisk (*) off in the right margin. If the property is held in trust, put a "T" in the right margin. If you aren't sure how the property is held, take a guess, and put a question mark off in the right margin.

Asset Type	Client1	Client2	Joint	*T?
Real Property (address)				
1a.________________________________	$_____________	$_____________	$_____________	
1b.________________________________	$_____________	$_____________	$_____________	
1c.________________________________	$_____________	$_____________	$_____________	
1d.________________________________	$_____________	$_____________	$_____________	
Automobiles (Year & make)				
2a.________________________________	$_____________	$_____________	$_____________	
2b.________________________________	$_____________	$_____________	$_____________	
2c.________________________________	$_____________	$_____________	$_____________	
Saving & Checking, Money Market Accounts (not in a Retirement Plan)				
3a.________________________________	$_____________	$_____________	$_____________	
3b.________________________________	$_____________	$_____________	$_____________	
3c.________________________________	$_____________	$_____________	$_____________	
CDs (not in a Retirement Plan)				
4a.________________________________	$_____________	$_____________	$_____________	
4b.________________________________	$_____________	$_____________	$_____________	

Asset Type	Client1	Client2	Joint	*T?

Mutual Funds (not in a Retirement Plan)

5a.______________________	$__________	$__________	$__________
5b.______________________	$__________	$__________	$__________
5c.______________________	$__________	$__________	$__________
5d.______________________	$__________	$__________	$__________

Stocks, Bonds, & Brokerage Accounts (not in a Retirement Plan)

6a.______________________	$__________	$__________	$__________
6b.______________________	$__________	$__________	$__________

Valuable Personal Property

7a.______________________	$__________	$__________	$__________
7b.______________________	$__________	$__________	$__________
7c. Various Contents of Home ("stuff")	$__________	$__________	$__________

Business Interests (Corporations, Partnerships, and Sole Proprietorships)

8a.______________________	$__________	$__________	$__________
8b.______________________	$__________	$__________	$__________

Annuities (not in a Retirement Plan)

Company	Annuitant/ Owner	Death Beneficiary	Term (# Years/ Life)	Payments & Begin Date	Value Today
9a.__________	__________	__________	__________	$__________	$__________
9b.__________	__________	__________	__________	$__________	$__________
9c.__________	__________	__________	__________	$__________	$__________
9d.__________	__________	__________	__________	$__________	$__________

Retirement Plans (Pension, 401(k), IRA), Profit Sharing, etc.

Plan & Type	Owner	Beneficiary	Death Value
10a.______________________	__________	__________	$__________
10b.______________________	__________	__________	$__________
10c.______________________	__________	__________	$__________
10d.______________________	__________	__________	$__________

Life Insurance Policies

Company	Insured	Owner	Beneficiary	Cash Value	Death Benefit
11a.____________	____________	____________	____________	$___________	$___________
11b.____________	____________	____________	____________	$___________	$___________
11c.____________	____________	____________	____________	$___________	$___________
11d.____________	____________	____________	____________	$___________	$___________

Trust Beneficiaries and Future Inheritance

12a. Are you currently beneficiaries of any trusts?____

12b. Are you anticipating any inheritance in the next 5-10 years? If so, estimate the amount._______________

Other Assets	**Client1**	**Client2**	**Joint**	***T?**
13a.______________________________	$____________	$____________	$____________	
13b.______________________________	$____________	$____________	$____________	

LIST OF LIABILITIES

	Client1	**Client2**	**Joint**
14a. Home Mortgage	$____________	$____________	$____________
14b. Notes	$____________	$____________	$____________
14c. Loans against Life Insurance	$____________	$____________	$____________
14d. Other (include credit cards)	$____________	$____________	$____________

14e. Do you intend to sell, mortgage, or refinance your home or other real estate within the next year or so?

❑ Yes ❑ No ❑ Not sure

INCOME

	Client1	**Client2**
15a. Social Security	$____________	$____________
15b. Pension	$____________	$____________
15c. Employment	$____________	$____________
15d.______________________________	$____________	$____________