



## Personal Information Booklet

*The information provided in this booklet is intended to be kept confidential*

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**CONFIDENTIAL**

## Background Information

### Husband

Full Legal Name: \_\_\_\_\_ Nickname: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
County: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Name used on legal documents:

\_\_\_\_\_

Employer: \_\_\_\_\_ Position: \_\_\_\_\_  
Business Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_  
Zip Code: \_\_\_\_\_  
Business Telephone: \_\_\_\_\_ Business Fax: \_\_\_\_\_

### Wife

Full Legal Name: \_\_\_\_\_ Nickname: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
County: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Cell  
Phone: \_\_\_\_\_ Business: \_\_\_\_\_ Business Fax: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

Name used on legal documents:

\_\_\_\_\_

Employer: \_\_\_\_\_ Position: \_\_\_\_\_  
Business Address: \_\_\_\_\_ City: \_\_\_\_\_  
State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Business Telephone: \_\_\_\_\_ Business Fax: \_\_\_\_\_

.....  
Date of Marriage: \_\_\_\_\_ Prenuptial Agreement: Yes \_\_\_ No \_\_\_

Do either of you have living parents? Yes \_\_\_ No \_\_\_

Do either of you having living grandparents? Yes \_\_\_ No \_\_\_

**Previous Residence:**

\_\_\_\_\_ Number of Years \_\_\_\_\_  
\_\_\_\_\_ Number of Years \_\_\_\_\_  
\_\_\_\_\_ Number of Years \_\_\_\_\_

**Children/Dependents:**

- 1) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_
  
- 2) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_
  
- 3) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_
  
- 4) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_
  
- 5) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_
  
- 6) Full Legal Name \_\_\_\_\_  
    Nickname: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
    Social Security \_\_\_\_\_  
    Child of: Joint \_\_\_\_\_ Husband \_\_\_\_\_ Wife \_\_\_\_\_

## ESTATE SUMMARY

Detailed financial statements from your CPA may be submitted in lieu of completing the summary below

**Please list the value of all assets at their gross value.  
Any debt gets listed to on the right column**

<b>Cash &amp; Bank Accounts</b>	<b>Husband</b>	<b>Joint</b>	<b>Wife</b>	<b>Debt</b>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<b>Brokerage Accounts/Mutual Funds</b>				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Individual Stocks and Bonds Held by you. (List each stock or bond)				
_____	_____	_____	_____	_____
<b>IRA or other Tax Qualified Account Debt</b>	<b>Husband</b>	<b>Joint</b>	<b>Wife</b>	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<b>Real Estate Properties:</b>				
_____	_____	_____	_____	_____


**Limited Partnership Interests:**


**Notes Receivable:**


<b>Business Interests</b>	<b>Husband</b>	<b>Joint</b>	<b>Wife</b>	<b>Debt</b>
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**Life Insurance Benefits** (Please list agents for all policies)


**Personal Properties** (Cars, Boats, etc.)


**Personal Properties (continued)**


<b>Annuities</b>	<b>Husband</b>	<b>Joint</b>	<b>Wife</b>	<b>Debt</b>
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**Miscellaneous Assets  
Not Included Elsewhere**

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

**Total Amount of Assets**

\_\_\_\_\_

Liabilities

\_\_\_\_\_

Net Worth

\_\_\_\_\_

Combined Net Worth

\_\_\_\_\_

**Advisors:**

Accountant: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Attorney: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Primary Bank: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Stockbroker: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Referred by: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

## SUCCESSORS

Typically, when most people travel, they plan for their affairs to be taken care for. When there are children being left at home, usually there's instructions for whoever is left in charge. Your successors are the "babysitters" that are put in charge while you are gone or incapacitated. Who do you want to make decisions for you?

**Who do you want to manage your financial affairs if you were incapacitated?**

Husband's Answer	Wife's Answer

**Who would you choose take charge of your estate and administer the terms of your trust or will upon your death?**

Husband's Answer	Wife's Answer

Who would you choose to make health care decisions for you?

Husband's Answer	Wife's Answer



If applicable, who would you choose for guardianship over your children?

Husband's Answer	Wife's Answer