

PERSONAL INFORMATION BOOKLET

The information disclosed in this
booklet will be kept strictly
confidential.

BAKER LAW FIRM, PC

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FRED L. BAKER, ESQ.

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FAMILY INFORMATION

Husband

Full Legal Name _____ Nickname _____ Birthdate _____
Address _____ City _____ State _____ Zip _____
County _____ Home Telephone _____ Home Fax _____
U.S. Citizen? Yes ___ No ___ Social Security Number _____ Cell Phone/Pager _____
Internet E-Mail Address _____
Name as you would like it to appear on legal documents _____

Employer _____ Position _____
Business Address _____ City _____ State _____ Zip _____
Business Telephone _____ Business Fax _____

Wife

Full Legal Name _____ Nickname _____ Birthdate _____
Address _____ City _____ State _____ Zip _____
County _____ Home Telephone _____ Home Fax _____
U.S. Citizen? Yes ___ No ___ Social Security Number _____ Cell Phone/Pager _____
Internet E-Mail Address _____
Name as you would like it to appear on legal documents _____

Employer _____ Position _____
Business Address _____ City _____ State _____ Zip _____
Business Telephone _____ Business Fax _____

Date of Marriage _____ Prenuptial Agreement? Yes ___ No ___

Do either of you have parents who are still living? Yes ___ No ___

Do either of you have grandparents who are still living? Yes ___ No ___

Previous States of Residence:

_____ Number of Years _____
_____ Number of Years _____
_____ Number of Years _____

Children

1. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____
2. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____
3. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____
4. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____
5. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____
6. Full Legal Name _____ Nickname _____ Birthdate _____
Social Security Number _____ Child of: Joint _____ Husband _____ Wife _____

Advisors

Accountant _____	Telephone _____
Attorney _____	Telephone _____
Primary Personal Bank _____	Telephone _____
Stockbroker _____	Telephone _____
Referred to Our Firm by _____	Telephone _____

ESTATE SUMMARY

[This information will be kept strictly confidential.]

Detailed financial statements from your CPA may be submitted in lieu of completing the Estate Summary below.

Please list the value of all assets at their gross value, i.e., without accounting for any debt.

Please list all debt associated with the assets in the right column

	Husband	Joint	Wife	Debt
Cash & Bank Accounts				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Brokerage Accounts/Mutual Funds				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Individual Stocks and Bonds held by you. (List each stock or bond on the reverse side.)				
_____	_____	_____	_____	_____

IRA or other Tax Qualified Account **Husband** **Joint** **Wife** **Debt**

Real Estate

(List additional parcels on reverse side.)

Limited Partnership Interests

Notes Receivable

Husband

Joint

Wife

Debt

Business Interests

Life Insurance Death Benefit
(Please list agent for each policy)

Personal Effects (Cars, Boats, etc.)

	Husband	Joint	Wife	Debt
Annuities				
Miscellaneous Assets Not Included Elsewhere				
Total Assets				
Liabilities				
Net Worth				
Combined Net Worth				

YOUR SUCCESSORS

Typically, when most people travel, they make arrangements for their affairs to be taken care of while they're gone. When there are children being left at home, there are usually several lists of instructions left for the babysitter, or whoever is left in charge. Your successors are the "babysitters" you're putting in charge of your affairs while you're incapacitated and after you're gone. Who do you want making decisions for you? This is a vital part of the planning process which most people are ill-equipped to decide on the spot. You do not have to have an answer set in stone. We would prefer, however, that you have several choices to consider choosing from.

1. Who would you choose to manage your financial affairs if you were incapacitated?

	Husband's Answer	Wife's Answer
First Choice		
Second Choice		
Third Choice		

2. Who would you choose to take charge of your estate and administer the terms of your trust or will upon your death?
[] Same as above; or

If different, list names below:

	Husband's Answer	Wife's Answer
First Choice		
Second Choice		
Third Choice		

3. Who would you choose to make health care decisions for you if you were incapacitated and could not make these decisions for yourself?

	Husband's Answer	Wife's Answer
First Choice		
Second Choice		
Third Choice		

4. If you have minor children, who would you choose to raise your children if you and your spouse could not?

Guardians for Minor Children:	Relationship:
First Choice:	
Second Choice:	