SHERMAN LAW, PLLC

CLIENT ESTATE PLANNING DATA SHEET

DATE _____ WHO REFERRED YOU?_____

FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

SPOUSE FIRST NAME _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

HOME ADDRESS _____

CITY _____ STATE _____ COUNTY _____ ZIP _____

MOBILE TELEPHONE-**HIS** (____)_____

MOBILE TELEPHONE-**HERS** (____)_____

PREFERRED E-MAIL(S)_____

EMPLOYER NAME -HIS _____

EMPLOYER NAME -HERS _____

SOCIAL SECURITY # YOU _____ SPOUSE _____

MARITAL STATUS ☐ MARRIED ☐ SINGLE ☐ WIDOW(ER) ☐ DIVORCED

UNITED STATES CITIZEN YOU ☐ YES ☐ NO SPOUSE ☐ YES ☐ NO

I. PLEASE BRING TO THE FIRST MEETING AS MANY OF THE FOLLOWING DOCUMENTS AS ARE APPLICABLE TO YOU

- ☐ Existing Wills, Trusts, Powers of Attorney, Advance Directives
- ☐ Life Insurance Policies
- ☐ Divorce Decrees or Property Settlement Agreements (Provide these documents if there are pending or active obligations related to the Divorce Decree or Settlement Agreement.)
- ☐ Deeds and Lease Agreements for Real Estate
- ☐ Vehicle Titles
- ☐ Corporation Documents and Shareholder Agreements
- ☐ LLC and Partnership Agreements
- ☐ Mortgages, Deeds of Trust or Notes for Money Owed to You

II. CHILDREN

1. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ __ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

2. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ __ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

3. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ _ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

4. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ _ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

5. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ _ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

6. FIRST NAME _____ _____ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

ADDRESS _____

TELEPHONE NO. _____

E-MAIL(S) _____

IS THIS A CHILD OF BOTH SPOUSES ☐ HUSBAND ONLY ☐ WIFE ONLY ☐

SPOUSE FIRST NAME _____ _ MIDDLE INITIAL _____

LAST NAME _____ BIRTHDATE _____

DOES THIS CHILD HAVE CHILDREN? IF SO, NAMES (Including middle initials) AND BIRTHDATES

_____

_____

_____

_____

USE ADDITIONAL PAGES IF NECESSARY

ARE ANY CHILDREN OR GRANDCHILDREN ADOPTED? ☐ YES ☐ NO

IF YES, PLEASE EXPLAIN _____

_____

ARE THERE SPECIAL NEEDS FOR ANY CHILD OR GRANDCHILDREN? ☐ YES ☐ NO

IF YES, PLEASE EXPLAIN _____

_____

III. INVENTORY OF ASSETS (PLEASE COMPLETE WITH FULL INFORMATION)

A. REAL ESTATE

RESIDENCE (Please indicate if this is a different address than the one listed at the top of this form.)

STATE	**MARKET VALUE**	**DEBT**

OTHER REAL ESTATE

ADDRESS OF PROPERTY	**MARKET VALUE**	**DEBT**	**TYPE OF PROPERTY**

B. PERSONAL PROPERTY AND NON-RETIREMENT FINANCIAL ACCOUNTS

	DESCRIPTION	**TITLE**	**VALUE**
VEHICLES			
BANK ACCOUNTS AND CDs			
INVESTMENT ACCOUNTS (Non-Retirement)			
MONEY OWED TO YOU			
OTHER			

C. RETIREMENT PLANS (Includes IRAs, 401Ks, 403Bs, Profit Sharing Plans)

OWNER	TYPE	BENEFICIARY	VALUE

D. LIFE INSURANCE

TYPE **T**-Term **WL**-Whole Life **UL**-Universal Life **G**-Group

OWNER	INSURED	BENEFICIARY	TYPE	FACE VALUE	CASH VALUE

E. BUSINESS (Please give complete information.)

TYPE **C**-CORPORATION **S**-S CORPORATION **SP**-SOLE PROPRIETORSHIP

P-PARTNERSHIP **LLC**-LIMITED LIABILITY COMPANY

TYPE	NATURE OF BUSINESS	OWNERSHIP PERCENTAGE	OWNERSHIP VALUE

DO ANY OF THE BUSINESSES HAVE A BUY-SELL AGREEMENT FOR THE BUSINESS?

_____

_____

_____

F. INTERESTS IN TRUSTS WHERE YOU ARE NAMED AS A BENEFICIARY

NAME OF TRUST	**INTEREST HELD**	**VALUE**	**WHEN TO RECEIVE**

G. ***NET ESTATE SUMMARY***

	MARKET VALUE
BUSINESSES	_____
LIFE INSURANCE	_____
RETIREMENT PLANS	_____
ALL OTHER	_____
GROSS ESTATE	_____
LESS DEBTS	_____
NET ESTATE VALUE	_____

IV. KEY PEOPLE IN YOUR ESTATE PLAN

PLEASE PROVIDE FULL LEGAL NAMES INCLUDING MIDDLE INITIALS

This section can be completed in advance or, in the meeting, we can discuss these roles and complete it together.

A. **TRUSTEE/EXECUTOR/FINANCIAL POWER OF ATTORNEY**

FIRST SUCCESSOR _____

SECOND SUCCESSOR _____

THIRD SUCCESSOR _____

B. **GUARDIANS FOR MINOR CHILDREN**

FIRST _____

SECOND _____

THIRD _____

C. **HEALTH CARE AGENTS**

The successors listed below will make medical decisions for you if both you and your spouse (if married) are unable to do so.

HUSBAND

FIRST SUCCESSOR _____

SECOND SUCCESSOR _____

THIRD SUCCESSOR _____

WIFE

FIRST SUCCESSOR _____

SECOND SUCCESSOR _____

THIRD SUCCESSOR _____