



The Spahn Law Firm, PLLC
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The Estate Planning Attorney with the Heart of a Teacher

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Date: _____ **CONFIDENTIAL**

MARRIED WITH NO CHILDREN PRELIMINARY INFORMATION

Husband's First Name Middle Last (*Sr., Jr., etc.*)

Preferred Name (*what I like to be called*)

Wife's First Name Middle Last

Preferred Name (*what I like to be called*)

Street Address

City State Zip County

Phone Numbers and E-mail:

Home

His Cell

Her cell

His E-mail

Her E-mail

Husband

Wife

Date of Birth

Date of Birth

Social Security # *(not required)*

Social Security # *(not required)*

Other ID

Other ID

Are you a US Citizen?
Yes No

Are you a US Citizen?
Yes No

Is this your first marriage?
Yes No

Is this your first marriage?
Yes No

EMPLOYMENT INFORMATION
(If Retired, Please Give Us Some Work History)

Husband

Wife

Working Retired

Working Retired

Company / Industry

Company / Industry

What do / did you do?

What do / did you do?

Years working / worked

Years working / worked

HUSBAND ASSET INFORMATION

Life Insurance			
<u>Company</u>	<u>How Titled/Owned</u>	<u>Beneficiary</u>	<u>Face Value</u> <i>Amt payable at death</i>
_____	_____	_____	_____
_____	_____	_____	_____

Annuities			
<u>Company</u>	<u>How Titled/Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

IRAs, 401 (K)'s, Profit Sharing, etc.			
<u>Company</u>	<u>How Titled/Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Investment Accounts/Stocks, Bonds, Mutual Fund			
<u>Company</u>	<u>How Titled / Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Cash, CD's, Savings, Checking			
<u>Bank/Credit Union Name</u>	<u>How Titled / Owned</u>	<u>Authorized Users</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Residence/Home			
<u>Address</u>	<u>County</u>	<u>Mortgage Balance</u>	<u>Value of Home</u>

Other Real Estate			
<u>Address</u>	<u>County</u>	<u>Mortgage Balance</u>	<u>Value</u>

Business Interest			
<u>Business</u>	<u>% Owned by You</u>		<u>Value</u>

Cars			
<u>Make / Model</u>	<u>Year</u>	<u>Outstanding Note</u>	<u>Value</u>

Notes Receivable <i>(This is a debt payable to you.)</i>			
<u>Debtor</u>	<u>Date Due</u>	<u>Outstanding Bal.</u>	<u>Value</u>

Personal Property			<u>Total</u>
<i>[Total value of all the contents in & around your home. (e.g., furniture, jewelry, household items, collectibles, etc.)]</i>			

TOTAL ASSETS

WIFE ASSET INFORMATION
[no need to list community property twice]

Life Insurance			
<u>Company</u>	<u>How Titled /Owned</u>	<u>Beneficiary</u>	<u>Face Value</u> <i>Amt payable at death</i>
_____	_____	_____	_____
_____	_____	_____	_____

Annuities			
<u>Company</u>	<u>How Titled/Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

IRAs, 401 (K)'s, Profit Sharing, etc.			
<u>Company</u>	<u>How Titled /Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Investments/Stocks, Bonds, Mutual Funds			
<u>Company</u>	<u>How Titled/Owned</u>	<u>Beneficiary</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Cash, CD's, Savings, Checking			
<u>Bank/Credit Union Name</u>	<u>How Titled /Owned</u>	<u>Authorized Users</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Other Real Estate

<u>Address</u>	<u>County</u>	<u>Mortgage Balance</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Business Interest

<u>Business</u>	<u>% Owned by You</u>	<u>Value</u>
_____	_____	_____

Cars

<u>Make / Model</u>	<u>Year</u>	<u>Outstanding Note</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

Notes Receivable: *(This is a debt payable to you.)*

<u>Debtor</u>	<u>Date Due</u>	<u>Outstanding Bal.</u>	<u>Value</u>
_____	_____	_____	_____

Personal Property:

*[Total value of all the contents in & around your home.
(e.g., furniture, jewelry, household items, collectibles, etc.)]*

Total

TOTAL ASSETS

TOTAL COMBINED HUSBAND'S & WIFE'S

INCOME INFORMATION:

Possible Inheritance for Husband: _____
(From your parents, relatives, etc.)

Possible Inheritance for Wife: _____
(From your parents, relatives, etc.)

Husband's Income: _____

Wife's Income: _____

Other Income: _____

Total Yearly Income: _____

Did anyone refer you to us? Yes No Who? _____

May we send a thank you note? Yes No

YOUR TEAM:

CPA _____ (phone #)

Financial Advisor _____ (phone #)

Insurance Agent (Home/Auto) _____ (phone #)

WHAT TOPICS WOULD YOU LIKE TO DISCUSS AT YOUR APPOINTMENT?

NAME YOUR 1ST CHOICE FOR EXECUTOR/TRUSTEE OF YOUR ESTATE
(You may name co-executors/trustees. Spouses normally name each other first.)

1. _____

WHO DO YOU NAME AS ALTERNATES IN CASE YOUR 1ST CHOICE CANNOT SERVE?

2. _____

3. _____

HOW DO YOU WANT YOUR ASSETS TO BE DISTRIBUTED?
(All to surviving Spouse?)

WHO DO YOU WANT TO NAME AS AGENT ON YOUR (FINANCIAL) DURABLE POWER OF ATTORNEY? *(Spouses normally name each other first. The alternates are usually the same as your alternate executors/trustees. This power of attorney gives the person or persons you name the power to sign your name if you are not able to do so. For instance, it can be used to sign a deed or tax return.)*

1. _____

2. _____

3. _____

WHO DO YOU WANT AS TO NAME AS AGENT ON YOUR MEDICAL POWER OF ATTORNEY? (In other words, who do you trust to be able to listen to doctors, then direct the doctor's actions? Spouses normally name each other first. Often, you will choose different alternates)

Husband
(Name)

Wife
(Name)

1. _____

1. _____

2. _____

2. _____

3. _____

3. _____

HAVE YOU CONSIDERED A DIRECTIVE TO PHYSICIANS & FAMILY?
(most commonly called a Living Will)

DO YOU HAVE OTHER ISSUES OR CONCERNS TO DISCUSS?
(like organ donation)

The Spahn Law Firm
Protecting and Preserving What's Most Precious to You