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ESTATE PLANNING GUIDE

THE INFORMATION YOU PROVIDE IN THIS ESTATE PLANNING GUIDE WILL BE USED TO PREPARE YOUR ESTATE PLANNING DOCUMENTS. PLEASE BE SURE THE INFORMATION IS ACCURATE AND COMPLETE.

IF YOU HAVE ANY QUESTIONS WHILE COMPLETING THIS GUIDE, PLEASE CONTACT US AT THE NUMBER ABOVE AND YOUR ATTORNEY OR HIS/HER ASSISTANT WILL ASSIST YOU.

Today's Date: _____

GENERAL INFORMATION

First Name	Middle Initial	Last Name
Date of Birth	Social Security Number	

ADDRESS:

Street	City	State	Zip
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PERSONAL INFORMATION

PHONE: HOME: _____ WORK: _____
CELL: _____
BEST PLACE TO REACH YOU BY EMAIL: _____
CITIZENSHIP: _____
OCCUPATION: _____

	Yes	No
Have you been previously married?		
Do you have an obligation pursuant to a divorce decree?		
Do you have children?		
Do you have any special needs children?		
Do you receive financial statements online?		
Do you pay bills online?		
Do you own real estate or personal property in another state?		
Are you a veteran?		

CHILDREN (Note: If you have more than 3 children, attach separate page with same information as requested below)

1. Child's Full and Legal Name: _____
Child's Address: _____
Street City State Zip

Cell Phone Number: _____ E-mail: _____

Child's date of birth: _____ Social Security No. _____

If child is deceased, date of death: _____

Child's spouse, if married: _____

Children of this child (Full and Legal Name/Age):

_____/_____/_____ / _____/_____/_____

_____/_____/_____ / _____/_____/_____

2. Child's Full and Legal Name: _____

Child's Address:

Street City State Zip

Cell Phone Number: _____ E-mail: _____

Child's date of birth: _____ Social Security No. _____

If child is deceased, date of death: _____

Child's spouse, if married: _____

Children of this child (Full and Legal Name/Age):

_____/_____/_____ / _____/_____/_____

_____/_____/_____ / _____/_____/_____

3. Child's Full and Legal Name: _____

Child's Address:

Street City State Zip

Cell Phone Number: _____ E-mail: _____

Child's date of birth: _____ Social Security No. _____

If child is deceased, date of death: _____

Child's spouse, if married: _____

Children of this child (Full and Legal Name/Age):

_____/_____/_____ / _____/_____/_____

_____/_____/_____ / _____/_____/_____

LEGAL INFORMATION

	Yes	No
Do you have a Will?		
Do you have an inter vivos or living trust?		
Do you have a current health care power of attorney document?		
Do you have a current durable financial power of attorney document?		
Have you ever made gifts to a trust that you created?		

If you answered “yes” to any of the above questions, please attach a copy of the document(s) to this Estate Planning Guide.

GIFT & INHERITANCE HISTORY

	Yes	No
Have you ever made any substantial gifts (in excess of \$10,000)?		
Have you ever filed a gift tax return?*		
Have you ever inherited any cash or other property?		
Do you expect to receive any substantial gifts or inheritances in the future?		
Are you a beneficiary of an existing trust created by someone else?		

***If you answered “yes”, please attach a copy of the gift tax return.**

ASSET INFORMATION

Please remember to bring to our initial meeting the following information:

- Copies of deeds and most current real estate tax bills for any real estate.
- Copies of a recent monthly statement for any bank account, savings account, brokerage account, mutual fund, etc.
- Copies of any US bonds and copies of any stock certificates that are not held in your brokerage account.
- A copy of your most recent valuation statement for any annuity. You should request copies of your current annuity beneficiary form and you should request a new annuity beneficiary form and bring this with you to our meeting.
- A copy of your most recent valuation statement for any IRA, 401(k) plan, profit-sharing plan, etc. You should request copies of your current beneficiary form on file and you should also request new beneficiary forms and bring these with you to our meeting.
- You should contact your life insurance agent and request a printout or illustration which will show death benefit information and cash value for all policies. You should also request new beneficiary forms for all life insurance policies and bring these forms with you to our meeting.