

# ATTORNEY CLIENT PRIVILEGED INFORMATION



## Estate Planning Information Sheet

Spouse 1: \_\_\_\_\_ DOB: \_\_\_\_\_ U.S. Citizen: Y  N

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Spouse 2: \_\_\_\_\_ DOB: \_\_\_\_\_ U.S. Citizen: Y  N

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Other Phone (work, home): \_\_\_\_\_

Primary Residence: FL Homestead: Y  N  Copy of Deed: Y  N

County: \_\_\_\_\_

Address: \_\_\_\_\_ Value: \_\_\_\_\_

\_\_\_\_\_ Mortgage: \_\_\_\_\_

Title on homestead: \_\_\_\_\_

Do you have any estate planning documents in place? Y  N

If yes, please provide copies including any prenuptial agreements, wills, powers of attorney, etc.

### Advisors

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

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

Financial Advisor: \_\_\_\_\_

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

### Assets

Cash: \$ \_\_\_\_\_

Stocks, Bonds, Securities: \_\_\_\_\_

IRA and Other Retirement: \_\_\_\_\_

Life Insurance (at face value): \_\_\_\_\_

Other Assets: \_\_\_\_\_

Total Assets (approx): \$ \_\_\_\_\_