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**PERSONAL INFORMATION FORM**

*(Confidential - To Be Completed by Client)*

Date \_\_\_\_\_

**Decedent's Information**

**Name:** \_\_\_\_\_  
First Middle Last

**Final Address:** \_\_\_\_\_  
Street City State Zip

**Birth Date:** \_\_\_\_\_ **Occupation and Name of Employer:** \_\_\_\_\_

**Date of Death:** \_\_\_\_\_ **Social Security Number:** \_\_\_\_\_

**Previously Married?** [  ] Yes [  ] No **If Yes:** [  ] Widowed [  ] Divorced **Veteran?** [  ] Yes [  ] No

**Trustee's Information**

**Name:** \_\_\_\_\_  
First Middle Last

**Address:** \_\_\_\_\_  
Street City State Zip

**Phone:** \_\_\_\_\_ (cell) \_\_\_\_\_ (home)

**Email Address:** \_\_\_\_\_ **Communication Preference:** Email/Cell/Home

**Referral Source:** Website/Social Media/Presentation/Personal Referral (include name) \_\_\_\_\_





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**Miscellaneous**

**1. What size is the decedent’s estate, approximately?**

- Under \$1,000,000
- \$1,000,001 - \$3,000,000
- \$3,000,001 - \$6,500,000
- More than \$6,500,000

**2. Do any beneficiaries have special needs or receive government assistance?**  Yes  No

**If yes, please provide additional information:** \_\_\_\_\_

**3. History of Gifts:** List all gifts the decedent made in excess of \$10,000 and all gifts of life insurance.

<u>Date of Gift</u>	<u>Donor</u>	<u>Recipient</u>	<u>Value</u>	<u>Reason for Gift</u>
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**4. Has the decedent ever filed a gift tax return?**  Yes  No

**Summary of Decedent’s Assets**

**Please provide the most recent statement, the company name, and the approximate value for the following assets:**

**1. Bank Accounts**


**2. Brokerage/Stock Accounts**


**3. Businesses**


**4. Real Property (please provide address and county)**




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**5. 401(k)/IRAs (include beneficiary designations)**

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**6. Pension/Additional Retirement Accounts (include beneficiary designations)**

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**7. Life Insurance (include beneficiary designations)**

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**8. Safe Deposit Box**

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**9. Personal Property**

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**10. Please provide a copy of the following documents, if executed by decedent:**

- Will
- Revocable Living Trust
- Irrevocable Trust
- Prenuptial Agreement
- Retirement Trust