

**CONFIDENTIAL
INFORMATION
SHEETS**

THE ZYSMAN LAW FIRM

—◆—
A PROFESSIONAL CORPORATION

Preserving the Wealth of Families

*Trust and Estate Planning • Business Formation & Planning Probate
and Estate Administration*

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CONFIDENTIAL INFORMATION SHEET

Please Print

Husband: Legal Name: _____ DOB _____ SSN _____
(single) (First) (M.I) (Last) MM DD YY

Wife: Legal Name: _____ DOB _____ SSN _____
(single) (First) (M.I) (Last) MM DD YY

Home Address: _____
Street City State Zip COUNTY

Home#: (____) _____ Work#: (H) (____) _____ Cell#:(H) (____) _____ Text Ok?:

Work#: (W) (____) _____ Cell #:(W) (____) _____ Text Ok?:

Email Address: _____
(Husband) (Wife)

Marriage Status: Single _____ Married _____ Divorced _____ Widowed(er) _____

Marriage Date: _____ 1st Marriage (Y or N) Husband _____ Wife _____

Did Husband and Wife Sign Pre/Post Marital Agreement (Y or N)

Occup: Husband: _____ Occup: Wife: _____

U. S. Citizens (Y or N) Husband _____ Wife _____

Full Name of Children	Whose? (H,W,Both)	D.O.B.	Male/ Female	Marital Status (S/M/D/W)	Do they have kids? Number:
1. _____ _____	_____	____/____/____	_____	_____	_____
2. _____ _____	_____	____/____/____	_____	_____	_____
3. _____ _____	_____	____/____/____	_____	_____	_____
4. _____ _____	_____	____/____/____	_____	_____	_____
5. _____ _____	_____	____/____/____	_____	_____	_____

Do any of your children/grandchildren have special needs? _____

Are any relatives (other than your children) financially dependent on you? _____

Do you have a Will? _____ Living Trust? _____

Anticipated inheritance (approx. value): Husband _____ Wife _____

ASSET LIST

(Please place estimated value under proper ownership)

Real Property (FULL ADDRESS) <i>(Street, City, State, Zip)</i>	Joint	Husband/ Single	Wife/ Single
	\$	\$	\$
Savings/Checking Accounts (Institutions)	Joint	Husband/ Single	Wife/ Single
	\$	\$	\$
Mutual Funds/Money Market (Institutions)	Joint	Husband/ Single	Wife/ Single
	\$	\$	\$
Stocks or Bonds (Institutions)	Joint	Husband/ Single	Wife/ Single
	\$	\$	\$
Business Interests (Type?)	Joint	Husband/ Single	Wife/ Single
	\$	\$	\$

ASSET LIST

(Please place estimated value under proper ownership, not beneficiary)

Life Insurance (Institutions)	Death Benefit	
	Husband	Wife
	\$	\$
Traditional/Roth Retirement Accounts (Institutions)	Husband	
	Wife	
	\$	\$
Annuities (Institutions)	Husband	
	Wife	
	\$	\$
Other (Stock Options, Notes Receivable, Rare Autos, Boats, Jewelry, etc...)	Husband	
	Wife	
	\$	\$

TOTALS _____
GRAND TOTAL _____

QUESTIONNAIRE

CLIENT'S NAME(s) _____

Date: _____

1. I want my estate to be kept private from predators and dishonest persons. YES No
2. I want to avoid estate and death taxes to the maximum extent of law. YES No
3. I want to avoid probate. YES No
4. I want to decide who will make decisions for me/my spouse if either of us becomes incapacitated. YES No
5. I want to plan for a child/grandchild with special needs. YES No
6. I want to disinherit one or more children. YES No
7. I want to protect my heirs' inheritance if my spouse chooses to remarry after my death. YES No
8. I want to protect my legacy from my heirs' potential failed marriages, lawsuits or creditors. YES No
9. I want my estate plan to be valid in all states. YES No
10. I want to avoid contest and disputes. YES No
11. I want to protect my children from a former marriage so they are treated fairly at my death. YES No
12. I want to insure that my inheritance passes to my grandchildren and great grandchildren protected from taxes, lawsuits, & failed marriages. YES No
13. I want to give to charity in my estate. YES No
14. I want to provide for my parents at my death. YES No
15. I want to provide for my pets at death. YES No