

ESTATE PLANNING INFORMATION

Jordan Balkema Elder Law Center, PLLC

1. Husband _____ Date of Birth _____ Social Security # _____
2. Wife _____ _____ _____
3. Address: _____
4. Home Phone _____ Work Phone _____
 Cell Phone _____ E-Mail _____

5. Information About Your Children (Living and Deceased):

<u>Name</u>	<u>Date of Birth</u>	<u>Marital Status</u>	<u>Name of Spouse</u>	<u>Number of Children</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

*Are any of the above children from a prior marriage? _____

CONCERNS: (YES/NO)

- _____ Are you concerned about probate expenses?
- _____ Are you concerned about Federal Estate Taxes?
- _____ Will your family be provided for upon your death?
- _____ Are you saving enough money for retirement?
- _____ Are you going to provide some/all of your child or grandchild's college funding?
- _____ Do you wish to maximize the amount left to your family?
- _____ Are any of your beneficiaries disabled?
- _____ Are you interested in tax deferred accumulation?
- _____ Are you concerned about nursing home costs?
- _____ Do you have any other concerns that you would like to discuss?

HOW BIG IS YOUR ESTATE?

Checking \$ _____

Savings \$ _____

Money Market \$ _____

Certificates of Deposit \$ _____

Husband – IRA/Retirement/Annuity \$ _____

Wife - IRA/Retirement/Annuity \$ _____

Stocks/Bonds \$ _____

Automobiles \$ _____

Real Estate – Home \$ _____

Real Estate – Other \$ _____

Husband – Life Insurance \$ _____

Wife – Life Insurance \$ _____

Land Contracts \$ _____

Household Goods/Personal Items \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

GROSS ESTATE \$ _____