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GARTENBERG HOWARD LLP

Attorneys at Law

Estate Planning Personal Data Form

Please bring this form with you to our meeting

Today's Date:

Wife				
Name		Date of Birth		
Social Security Number		U.S. Citizen? ☐ Yes ☐ No		
Residence				
Email Address				
Cell Phone	Work Phone		Home Phone	
Disability Insurance? ☐ Yes ☐ No		Long Term Care Insurance? ☐ Yes ☐ No		
Current Employer				

Husband				
Name		Date of Birth		
Social Security Number		U.S. Citizen? ☐ Yes ☐ No		
Residence (only if different from above)				
Email Address				
Cell Phone	Work Phone		Home Phone	
Disability Insurance? ☐ Yes ☐ No		Long Term Care Insurance? ☐ Yes ☐ No		
Current Employer				

Children

Name	Parent	Date of Birth

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Marital Information
Date and Place of current Marriage
Prenuptial Agreement? ☐ Yes ☐ No
Prior Marriage info (name(s)/how marriage(s) ended)

Wife	Husband

Do you have ongoing financial obligations to former spouse(s)/children of prior marriages? ☐ Yes ☐ No
(If so, please bring Property Settlement Agreement)

Safe Deposit? ☐ Yes ☐ No	Where?

Advisors			
Name	Address	Phone	Email

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Other Attorneys			
Name	Address	Phone	Email

Accountant			
Name	Address	Phone	Email

Insurance Broker			
Name	Address	Phone	Email

Primary Financial Advisor			
Name	Address	Phone	Email

Asset/Liability Snapshot

Joint	
Cash (in bank or otherwise)	
Stocks/Bonds/Mutual Funds	
Life Insurance policies	
Retirement Plans (IRA, 401(k), 403(B), SEP)	
Real Estate - Residence (net of mortgages)	
Real Estate - Other (net of mortgages)	
Business Holdings	
Other	
Significant Liabilities (other than mortgages)	
Total	

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Wife	
Cash (in bank or otherwise)	
Stocks/Bonds/Mutual Funds	
Life Insurance policies	
Retirement Plans (IRA, 401(k), 403(B), SEP)	
Real Estate - Residence (net of mortgages)	
Real Estate - Other (net of mortgages)	
Business Holdings	
Other	
Significant Liabilities (other than mortgages)	
Total	

Husband	
Cash (in bank or otherwise)	
Stocks/Bonds/Mutual Funds	
Life Insurance policies	
Retirement Plans (IRA, 401(k), 403(B), SEP)	
Real Estate - Residence (net of mortgages)	
Real Estate - Other (net of mortgages)	
Business Holdings	
Other	
Significant Liabilities (other than mortgages)	
Total	

Please bring with you

- **a.** Copies of present Will of Husband and Wife
- **b.** Copies of trust agreements in which you or your spouse are donor or beneficiary
- **c.** Copies of Powers of Attorney and Living Wills
- **d.** Deeds to all real property
- **e.** Life Insurance policies; annuity agreements
- **f.** Prior gift tax returns, if any
- **g.** Last Federal income tax return
- **h.** Pension and/or profit-sharing plan(s) benefit info.
- **i.** Buy and Sell agreements; other agreements concerning business interests

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j. Divorce decrees, if any
k. Prenuptial or other marital agreements

We also recommend that you take this opportunity to bring together **FOR YOUR OWN USE - PLEASE DO NOT BRING TO OUR MEETING -** the following additional documents/information

a. Copies of one month's statement for each bank/brokerage/ investment account.
b. Copies of one month's bill for each creditor that you pay online (or otherwise).
c. User ID numbers/Passwords for assets (on-line bank/investment accounts), liabilities (credit cards/mortgage accounts/home utilities/tax payment arrangements, etc.) that you access on-line; don't forget social media sites (e.g. Facebook, LinkedIn, Pinterest, Instagram, Twitter, etc.) and access to your computer(s) and other electronic devices. In this case, it may mean arranging for on-line password vaults or other similar arrangements).
d. List of passwords for any ATM card(s).
e. Copies of your disability/long term care/health/life insurance information.
f. Copies of last three year's income tax returns.
g. Copies of car and boat titles/registration/drivers' license and notation as to where originals are kept.
h. Copies of your birth certificate, marriage license, divorce decrees, death certificate for predeceased spouse/issue, and notation as to where originals are kept.
i. Copy of Military Discharge papers.
j. List of the contact information for significant people in your life.
k. Any other document or information that someone would need to step into your shoes.

Include here any other information that you think is important to your estate planning

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