

**Part I
Personal Information**

Client's Legal Name _____
(name on Driver's License or government-issued photo ID)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ US Citizen? _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ County of Residence _____ MobileNumber _____

Employer _____ Business Telephone _____ Position _____

Business Address _____ City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my E-mail address.

Date of Marriage _____

Client's Spouse or Second Grantor's Legal Name _____
(name on Driver's License or government-issued photo ID)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ US Citizen? _____

Home Address _____ City _____ State _____ Zip _____

Home Telephone _____ County of Residence _____ MobileNumber _____

Employer _____ Business Telephone _____ Position _____

Business Address _____ City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my E-mail address.

Identification of Living Children

Full Legal Name _____ DOB _____ Joint Parents Client Spouse

Full Legal Name _____ DOB _____ Joint Parents Client Spouse

Full Legal Name _____ DOB _____ Joint Parents Client Spouse

Full Legal Name _____ DOB _____ Joint Parents Client Spouse

Full Legal Name _____ DOB _____ Joint Parents Client Spouse

Identification of Deceased Children

Full Legal Name _____ DOD _____ Joint Parents Client Spouse

Left Surviving Children/Descendants?: Yes No If yes, please name:

Full Legal Name _____ DOD _____ Joint Parents Client Spouse

Left Surviving Children/Descendants?: Yes No If yes, please name:

Important Family Questions

(Please check "Yes" or "No" for your answer)	Yes	No
Are you (or your spouse) receiving Social Security, disability, or other governmental benefits? <i>Describe</i> _____		
Are you (or your spouse) making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
If married, have you and your spouse signed a pre- or post-marriage contract? <i>Please furnish a copy</i>		
Have you (or your spouse) been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you (or your spouse) ever filed federal or state gift tax returns? <i>Please furnish copies of these returns</i>		
Have you (or your spouse) completed previous will, trust, or estate planning? <i>Please furnish copies of these documents</i>		
Do you support any charitable organizations now that you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are there any other charitable organizations you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
If married, have you lived in any of the following states while married to each other? <i>Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin</i>		
Are you (or your spouse) currently the beneficiary of anyone else's trust? <i>If so, please explain below.</i>		
Do any of your children have special educational, medical, or physical needs?		
Do any of your children receive governmental support or benefits?		
Do you provide primary or other major financial support to adult children or others?		

Additional Information
