

Appt Date: _____ Time: _____

Estate Planning Information

Thank you for contacting us about estate planning. This data sheet is helpful for organizing your thoughts about estate planning and for providing information to us about your family and estate. Please complete it as thoroughly as possible, either skipping or placing question marks on those items that seem inapplicable or about which you have questions or simply don't know the answer.

Personal Information		
Full Name:		
Nickname or Preferred Name:		
Birth Date:		
Occupation:		
Estimated Annual Income from Salary, Bonuses, Etc.:		
Estimated Annual Investment Income (Dividends, Interest, Etc.):		
Work Telephone/Fax:		
Mobile/Pager:		
Email Address:		
Home Address (Include County):		
Home Telephone/Fax:		

Date and Place of Marriage:		
If you have lived outside Texas during this marriage, please list the states and dates of residence:		
If either of you were previously married, list the dates of prior marriage, name or prior spouse, names of living children from prior marriage(s), and state whether marriage ended by death or divorce:	Spouse 1	Spouse 2
Describe any real estate owned by either or both of you outside Texas:		
Location of Safe Deposit Box (if any):		
Name and Telephone of Your Insurance Agent (if any):		
Name and Telephone of Your Accountant (if any):		
Name and Telephone of Your Broker or Financial Planner (if any):		
Other Information:		
Children		
Full Name	Birth Date	Address & Phone Number (If Child Does Not Reside with You)

Assets

**If you know if the property is your separate property, your spouse's separate property or community property, so state. If not, state the name(s) which appear on the title, if known, and state whether the property is held with right of survivorship, if known.*

Description	Current Fair Market Value	How Is Title Held?*
Bank Accounts (not IRAs and Retirement Plans)		
Stocks, Bonds and Mutual Funds (not IRAs and Retirement Plans)		
Closely Held Businesses, Partnerships, Etc.		
Real Estate		
Automobiles, Boats, Etc.		
Other Property		
Total \$		

Liabilities	
Description	Amount

Life Insurance and Annuities				
Company	Insured	Beneficiary(s)	Face Amount	Cash Value
Total				

IRAs, 401(k)s, and Other Retirement Plans				
Company/Custodian	Participant	Type of Plan	Vested Amount	Death Benefit
Total \$				

Dispositive Plan:
(Describe in general terms how you wish to leave your property at death)

Other Beneficiaries
(Information about persons other than your spouse and descendants who you wish to benefit.)

Full Name	Age	Address	Relationship to You

Fiduciaries		
List name, address, home telephone and relationship to you for each person)		
	Spouse 1	Spouse 2
Executor: (The executor is the person responsible for probating the will, filing the estate tax return, and distributing assets to beneficiaries.)		
First Alternate Executor:		
Second Alternate Executor:		
Trustee: (The trustee is the person responsible for long-term management of property for the surviving spouse, children, or other beneficiaries.)		
First Alternate Trustee:		
Second Alternate Trustee:		
Guardian of Minor Children: (The guardian is the person who will take physical care of minor children should both parents die.)		
First Alternate Guardian:		
Second Alternate Guardian:		
Property Agent: (The property agent is the person who will handle your financial affairs if you become incapacitated.)		
First Alternate Property Agent:		
Second Alternate Property Agent:		
Health Care Agent: (The health care agent is the person who will make medical decisions for you if you become incapacitated.)		
First Alternate Health Care Agent:		
Second Alternate Health Care Agent:		
Trust Protector:		
Directive to Physicians (Allows you to instruct physicians to administer, withdraw or withhold life-sustaining treatment when it has been determined by your physician that you have an irreversible or terminal condition and you are not able to communicate.)	Yes	No