

# SOMERS TAMBLYN ISENHOUR BLECK

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(206) 340-2200

## CONFIDENTIAL ESTATE PLANNING INFORMATION

### Personal Information

#### Spouse 1

#### Spouse 2

Full name:

\_\_\_\_\_

\_\_\_\_\_

Birth date:

\_\_\_\_\_

\_\_\_\_\_

Citizenship:

\_\_\_\_\_

\_\_\_\_\_

Home address:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Home telephone:

\_\_\_\_\_

\_\_\_\_\_

Email address:

\_\_\_\_\_

\_\_\_\_\_

Employer:

\_\_\_\_\_

\_\_\_\_\_

Office telephone:

\_\_\_\_\_

\_\_\_\_\_

Name of prior spouse (if any):

\_\_\_\_\_

\_\_\_\_\_

Dependents other than children:

\_\_\_\_\_

\_\_\_\_\_

### Children

|    | <u>Name</u> | <u>Sex</u>   | <u>Birthdate</u> | <u>Child only of</u>  | <u>Married?</u>   | <u>Number of Children</u> |
|----|-------------|--|------------------|---|---|---------------------------|
| 1. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 2. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 3. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 4. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 5. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 6. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 7. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |
| 8. | _____       | <input type="checkbox"/> Male<br><input type="checkbox"/> Female | _____            | <input type="checkbox"/> Husband<br><input type="checkbox"/> Wife | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | _____                     |

**If you have minor children you will need to nominate a guardian and a trustee for any trust for the children.**

Life Insurance

Spouse 1

Spouse 2

Number of policies:

\_\_\_\_\_

\_\_\_\_\_

Total face amount:

\_\_\_\_\_

\_\_\_\_\_

Total present cash value:

\_\_\_\_\_

\_\_\_\_\_

Primary beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

Contingent beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

Retirement Benefits

Spouse 1

Spouse 2

Employer Plans:

Type (pension, profit sharing,  
ESOP, 401(k), etc.)

\_\_\_\_\_

\_\_\_\_\_

Approximate balance(s):

\_\_\_\_\_

\_\_\_\_\_

Primary beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

Contingent beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

IRA:

Approximate balances(s):

\_\_\_\_\_

\_\_\_\_\_

Primary beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

Contingent beneficiary(ies):

\_\_\_\_\_

\_\_\_\_\_

ASSETS AND LIABILITIES

| A. <b><u>Assets</u></b>  | Separate Property<br><u>Spouse 1</u> | Separate Property<br><u>Spouse 2</u> | Community<br><u>Property</u> |
|--|--------------------------------------|--------------------------------------|------------------------------|
| Cash (checking, savings, or money market accounts)                     | \$ _____                             | \$ _____                             | \$ _____                     |
| Short-term investments (treasury bills, certificates of deposit, etc.) | \$ _____                             | \$ _____                             | \$ _____                     |
| Publicly traded securities and bonds                                   | \$ _____                             | \$ _____                             | \$ _____                     |
| Annuities  | \$ _____                             | \$ _____                             | \$ _____                     |
| Closely held securities  | \$ _____                             | \$ _____                             | \$ _____                     |
| Principal residence  | \$ _____                             | \$ _____                             | \$ _____                     |
| Vacation home  | \$ _____                             | \$ _____                             | \$ _____                     |
| Other real estate  | \$ _____                             | \$ _____                             | \$ _____                     |
| Partnerships   | \$ _____                             | \$ _____                             | \$ _____                     |
| Accounts receivable  | \$ _____                             | \$ _____                             | \$ _____                     |
| Face amount of life insurance  | \$ _____                             | \$ _____                             | \$ _____                     |
| Retirement benefits  | \$ _____                             | \$ _____                             | \$ _____                     |
| Qualified plans  | \$ _____                             | \$ _____                             | \$ _____                     |
| Non-qualified plans  | \$ _____                             | \$ _____                             | \$ _____                     |
| Furnishings (including art and antiques)                               | \$ _____                             | \$ _____                             | \$ _____                     |
| Automobiles  | \$ _____                             | \$ _____                             | \$ _____                     |
| Boats  | \$ _____                             | \$ _____                             | \$ _____                     |
| Other (specify) _____  | \$ _____                             | \$ _____                             | \$ _____                     |
| <b>TOTAL ASSETS</b>  | <b>\$ _____</b>                      | <b>\$ _____</b>                      | <b>\$ _____</b>              |
|  |                                      |                                      |                              |
| B. <b><u>Liabilities</u></b>   | Separate Property<br><u>Spouse 1</u> | Separate Property<br><u>Spouse 2</u> | Community<br><u>Property</u> |
| Mortgage(s)  | \$ _____                             | \$ _____                             | \$ _____                     |
| Credit Card Debt   | \$ _____                             | \$ _____                             | \$ _____                     |
| Loans, notes, etc.   | \$ _____                             | \$ _____                             | \$ _____                     |
| Other obligations  | \$ _____                             | \$ _____                             | \$ _____                     |
| <b>TOTAL LIABILITIES</b>   | <b>\$ _____</b>                      | <b>\$ _____</b>                      | <b>\$ _____</b>              |
|  |                                      |                                      |                              |
| <b>ASSETS – LIABILITIES = NET WORTH</b>                                | <b>\$ _____</b>                      | <b>\$ _____</b>                      | <b>\$ _____</b>              |