

701 Pike Street, Suite 1510 Seattle, Washington 98101 Tel (206) 340-2200 Fax (206) 232-4049

# CONFIDENTIAL ESTATE PLANNING INFORMATION

#### Personal Information:

C1301	nai mnoi	mation.					
				Spouse 1		Spouse 2	2
Full n	ame:						
Citizenship:			U.S. Citizen			U.S. Citiz	zen
Birth date:							
Home	e address:						
Home telephone:							
Email address:							
Emplo	oyer:						
Office telephone:							
Name	of prior s						
(if any	-						
Depei childr	ndents oth	ner than					
Ciliui	en.						
			single	☐ marrie	d 🗌 regis	tered domestic par	tners
widowed divorced separated							
Marit	al Status:		Other	:			
Childr	en:						
_				0 1	Birth		Number of
C	hild of Spouse 1	Child's Na	me	Gender	date	Married? ☐ Yes	their kids
1.	Spouse 2					□ No	
	Spouse 1			<del></del>		Yes	
2.	Spouse 2					☐ No	
	Spouse 1					Yes	
2	Spouse 2					☐ No	
	Spouse 1			<del></del> -		Yes	
4.	Spouse 2					☐ No	

## Life Insurance & Retirement Plans:

Life Insurance	Spouse 1	Spouse 2	
Number of policies:			
Benefit value:			
Primary beneficiary(ies):			
Contingent beneficiary(ies):			
Annuity(ies)	Spouse 1	Spouse 2	
Number of policies:			
Benefit value:			
Primary beneficiary(ies):			
Contingent beneficiary(ies):			
Employer Retirement Plans: Type (pension, profit	Spouse 1	Spouse 2	
sharing, ESOP, 401(k), etc.)			
Approximate balance(s):			
Primary beneficiary(ies):			
Contingent beneficiary(ies):			
IRA:	Spouse 1	Spouse 2	
Approximate balances(s):			
Primary beneficiary(ies):			
Contingent beneficiary(ies):			
Additional Information:			

## Other Assets:

Financial & Investment Accounts	Spouse 1	Spouse 2	Joint Property
Cash (checking, savings, or			
money market accounts)	\$	_ \$	_ \$
	\$	\$	\$
Investments (CD, Bond,			
Mutual Funds, Brokerage /			
Stocks)	\$	\$	_ \$
	\$	\$	\$
Partnerships and Business			
Assets	\$	\$\$	\$\$
Real Property:	Spouse 1	Spouse 2	Joint Property
Principal residence			
Out of state?	\$	\$	_ \$
Vacation home	_		1
Unit of state?	\$	\$	_ \$
Other real estate and/or mineral rights			
Out of state?	\$	\$	Ś
	•		_ '
Personal Property:	Spouse 1	Spouse 2	Joint Property
Furnishings (including art and antiques)	\$	\$	¢
• •			_
Automobiles	\$	\$	\$
Boats	\$	\$\$	\$
Other (specify)	\$	\$\$	_ \$
TOTAL ASSETS IN THIS SECTION	\$	 \$	\$

### Liabilities:

Liabilities	Spouse 1	Spouse 2	Joint Property
Mortgage(s)	\$	\$\$	\$\$
Credit Card Debt	\$	\$\$	\$\$
Loans, notes, etc.	\$	\$\$	\$\$
Other obligations	\$	\$\$	\$\$
TOTAL LIABILITIES	\$	\$\$	\$\$

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Please note that our firm also offers tailored guidance for individuals and families who wish to include planning for a disabled family member, planning for anticipated long-term care needs in the future, and understanding benefits to pay for expensive care. If that is something you wish to discuss with the attorney, please let us know so that we can plan for your consultation

Additional Information:		