

# SOMERS TAMBLYN / ISENHOUR BLECK

701 Pike Street, Suite 1510  
Seattle, Washington 98101  
(206) 340-2200

## CONFIDENTIAL ESTATE PLANNING INFORMATION

### Personal Information

#### Partner 1

#### Partner 2

Full name:		
Birth date:		
Citizenship:		
Home address:		
Home telephone:		
Email address:		
Employer:		
Office telephone:		
Name of prior spouse or life partner (if any):		
Dependents other than children:		

### Children

	<u>Name</u>	<u>Sex</u>	<u>Birthdate</u>	<u>Child only of</u>	<u>SSN</u>	<u>Married?</u>	<u>Number of Children</u>
1.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	
2.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	
3.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	
4.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	
5.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	
6.		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2		<input type="checkbox"/> Yes <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.**

Relationship Information

Yes

No

Have you registered as Domestic Partners in Washington State?

Have you registered as Domestic Partners, entered a Civil Union or married outside of Washington State?

Has the relationship been terminated by divorce or other legal proceeding?

Have you signed a Co-habitation agreement, Domestic Partnership Agreement, Community Property Agreement, Separate Property Agreement or other similar agreement?

Life Insurance

Partner 1 Insured

Partner 2 Insured

Number of policies:

Total face amount:

Total present cash value:

Primary beneficiary(ies):

Contingent beneficiary(ies):

Retirement Benefits

Partner 1

Partner 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 <u>Partner 1</u>	Separate Property <u>Partner 2</u>	Joint <u>Property</u>
Cash (checking and savings 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 <u>Partner 1</u>	Separate Property <u>Partner 2</u>	Community <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>