

Instructions: Please complete as much of this form as you can before our meeting and bring copies of any requested documents. Additional pages may be added as necessary. It is important that you complete this form as thoroughly as you can as my advice to you will be based on the information you provide. Any material misstatements or omissions may result in improper advice for your situation. The information that you supply on this form will be retained in my file. No information will be released to any person without your prior permission.

A. Personal Information

Name

Social Security Number

Full (Previous) Name(s)

Principal Residence Address

City

State

Zip

County

Telephone Number

Cell Phone Number

Fax Number

E-mail Address

Birthdate

Age

Birthplace

Citizenship

U.S. Immigration Status

Employer's Name

Occupation

Position or Title

Work Address

City

State

Zip

Work Telephone

Work E-mail Address

Preferred Method(s) of
Communication

Home Phone
E-mail

Work Phone

Cell Phone

Are you married or registered?

Yes (Complete Parts B & C)

No

If not, do you plan to marry or
register in the near future?

Yes (Complete Parts B & C)

No

Have you ever been married or
registered before?

Yes (Complete Part D)

No

Have you ever had children?

Yes (Complete Part E)

No

If not, do you plan to have any
children?

Yes

No

B. Spouse's or Partner's Information

Name

Social Security Number

Full (Previous) Name(s)

Cell Phone

E-mail Address

Birthdate

Age

Birthplace

Citizenship

U.S. Immigration Status

Employer's Name

Occupation

Position or Title

Work Address

City

State

Zip

Work Telephone

Work E-mail Address

Have you ever been married or registered before? Yes (Complete Part D)
No

Have you ever had children? Yes (Complete Part E)
No

C. Present Marriage or Registered Domestic Partnership Information

Date of Marriage or Registration

Place of Marriage or Registration
(City, State, Country)

Do you have a Prenuptial Agreement or other property agreement? Yes (Please provide a copy)
No

In preparing an estate plan, you must consider how property is owned. Check only one.

- a. You and your spouse acquired all property together as "community property."
- b. Either you or your spouse have at least one item that is "separate property."
- c. Domestic partners owning "community property." (Special planning required.)
- d. Domestic partners owning "separate property."

If you answered b. or d. in the question above, answer the three questions below:

Items (attach a list if necessary)

Spouse who owns item(s)

How acquired? (Choose One:
Inheritance, Gift, Before Marriage or
By Agreement)

D. Previous Marriage(s) and/or Registered Domestic Partnerships

Name 3

Social Security Number

Telephone Number

Address

Birthdate

Age

2. Children, Grandchildren and Great-Grandchildren of Previous Relationship (Please specify)

Name 1

Social Security Number

Telephone Number

Address

Birthdate

Age

Name 2

Social Security Number

Telephone Number

Address

Birthdate

Age

F. Current Estate Plan

1. a. Date of revocable trust

b. Last restated/amended

2. a. Date of will

b. Date of last codicil

3. a. Does anyone currently hold your power of attorney? Yes
No

b. Durable Power of Attorney for Property Matters: Attorney-in-fact

c. Date power granted

d. Expiration date

e. Advance Health Care Directive: Attorney-in-fact

c. Date power granted

d. Expiration date

4. Location of original instrument(s)

G. Tax Considerations

1. a. Total taxable gifts made to date

b. Unified tax credit

2. Generation-skipping transfer tax exemption used

3. Have you used the California property tax parent/child exemption? Yes
No

4. a. Do you anticipate receiving any substantial gifts/inheritances in the near future? Yes
No

b. If so, please describe

H. Other Special Considerations

If answering "yes" to any of these questions, attach additional pages as needed and provide copies of relevant documents.

Do you have any family members who receive or may qualify for public benefits, subject to income/asset requirements (i.e. special needs trust may be appropriate)? Yes
No

Do you hold power of appointment (i.e. power to designate beneficiaries; not simply being named as a fiduciary or beneficiary)? Yes
No

Are you currently acting as trustee of or receiving benefits from a trust?	Yes
	No
Do you have a shareholder, partnership or buy-sell agreement?	Yes
	No
Do you own property in a foreign country or in a state other than California?	Yes
	No
Are you currently involved in any litigation, or are there any known potential claims that may result in litigation?	Yes
	No
Are you engaged in high-risk circumstances that make creditor planning important?	Yes
	No
Do you have any pets that should be included in your estate plan?	Yes
	No

I. Agents and Advisors that Attorney is Authorized to Contact

Tax Accountant (Name & Company)

Address

Telephone Number

E-mail Address

Financial Planner (Name & Company)

Address

Telephone Number

E-mail Address

Life Insurance Broker (Name & Company)

Address

Telephone Number

E-mail Address

Mortgage loan or account number
for primary residence

Firm or Company

Address

Telephone Number

E-mail Address

Property Insurance Broker (Name &
Company)

Homeowner's Insurance Policy
Number

Address

Telephone Number

E-mail Address

J. Safe Deposit Boxes

Name and address of depository

Box Number

Who has access

Location of Key

K. Your Estate Planning Goals

Check the appropriate boxes to prioritize your estate planning goals. Include your comments and feel free to attach additional pages. This section is very important.

Goals	Minimize estate taxes Avoid probate Provide for spouse or partner Provide for children of current relationship Provide for children of prior relationship Provide for another loved one Disinherit a natural heir Protect self from greedy heirs Avoid or reduce family quarrels Name guardians for minor children Prevent an ex-partner from controlling my assets Plan for my possible disability Care for someone else who is disabled Protect young or irresponsible beneficiaries Provide for charitable causes Make lifetime gifts Preserve privacy
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Comments

L. Your Estate Plan Choices

Do you want to set up a Revocable Living Trust?	Yes
	No

Successor Trustees and/or Executors (in order of preference):

1. Name
Relationship
2. Name
Relationship
3. Name
Relationship

Tip: The trustee administers a trust. (You will be trustee first.) The executor administers a will. If you are setting up a trust, please list one person to serve in both roles. If you are listing co-trustees, consider how disagreements would be resolved (e.g., one trustee has veto power, a third party casts the deciding vote).

Specific Bequests (if any):

Recipient 1 and Relationship

Gift:

Alternate disposition

Recipient 2 and Relationship

Gift:

Alternate disposition

Tip: A specific bequest is an item or group of items you wish to single out and leave to certain people. A specific bequest generally involves a money gift, a family heirloom or something of sentimental value. Please include an alternate disposition in the event the beneficiary does not survive you. You may name a backup beneficiary or state that the gift shall lapse (i.e., be distributed with the residue of your estate).

Example: I leave my stamp collection to my son, Jim Doe, if he survives me, otherwise this gift shall lapse.

Residuary Beneficiaries (for the bulk of your estate):

Beneficiary 1

Primary or Secondary

Primary

Secondary

Percent of Estate

Relationship

Beneficiary 2

Primary or Secondary

Primary

Secondary

Percent of Estate

Relationship

Beneficiary 3

Primary or Secondary

Primary

Secondary

Percent of Estate

Relationship

Beneficiary 4

Primary or Secondary	Primary
	Secondary

Percent of Estate

Relationship

Beneficiary 5

Primary or Secondary	Primary
	Secondary

Percent of Estate

Relationship

Beneficiary 6

Primary or Secondary	Primary
	Secondary

Percent of Estate

Relationship

Tip: Given the uncertainty of how long you will live and how large your estate will be, it is easiest to divide your estate into shares, rather than into dollars amounts. The “residue” or bulk of your estate will be determined after your final expenses and taxes are paid, and after any specific bequests are made. Since a beneficiary may predecease you, it is important to either (a) provide for an alternate beneficiary or (b) provide that the deceased individual’s share will be divided among the surviving beneficiaries, in equal shares or proportionately. If the beneficiary is related to you, and may have children, you may specify that those children receive a deceased parent’s share by listing “issue” as in the example.

Charitable Beneficiaries:

Are there one or more charitable organizations to which you would like the residue of your estate to go if all of your residuary beneficiaries and your relatively close heirs at law (determined by the State) die before the residue has been fully distributed?

Yes

No

If so, which ones?

Special Trust Provisions

You may prefer that beneficiaries receive their inheritance outright (i.e., immediately upon your death). However, to preserve assets and protect beneficiaries from creditors or spouses, you may wish to set up a continued trust, to be managed by your trustee or by a third trustee. If you wish to set up a continued trust for one or more beneficiary, please specify the terms of the trust and trustee, if other than the trustee of your trust. (Your attorney will be happy to assist you in completing this section.)

Beneficiary/ies 1

Trust Terms

Trust Ends

Alternate Disposition

Beneficiary/ies 2

Trust Terms

Trust Ends

Alternate Disposition

Tip: You cannot leave more than \$2,000 to a child under age 18 without setting up a trust. Of course, you may feel that a child is not prepared at age 18 to handle a large quantity of assets. A trust may continue to any age of your choosing (common ending dates are 18, 21, 25, 30 or 35). You may specify that the trustee make discretionary payments to cover the beneficiary's health, education, maintenance and support, as the trustee determines is appropriate. You may require mandatory income payments after a certain age, to reduce the income tax on any gains realized by assets inside the trust. You may request that the trustee make distributions upon certain life events (e.g., first car, graduation, wedding) or pay a certain percent of the trust funds each month, year, or other period of time.

Guardians (in order of preference):

Name 1

Relationship

Name 2

Relationship

Name 3

Relationship

Name 4

Relationship

If naming married couples, what should happen if one member of the couple is unwilling to serve as guardian, or if the couple does not stay together? Please indicate whether one member of the couple is the preferred guardian or whether the next married couple should become guardians.

Financial Agents (durable power of attorney for finances):

- a.
- b.
- c.

Tip: It is best to use your trustee/executor as agent, so that one person manages all financial issues. Usually, spouses list each other as the first agent.

Mark your choice. If your spouse or partner has different wishes, indicate so.

When should the power become effective?

Immediately (after power is signed)

Springing (after two physicians have certified that you cannot make decisions)

Spouse or partner's choice

Immediately (after power is signed)

Springing (after two physicians have certified that you cannot make decisions)

Health Care Agents (Advance Health Care Directive):

- a.
- b.
- c.

Spouse's or partner's health care agents:

- a.
- b.
- c.

Health Care and Power of Attorney Instructions

Mark your choice. If your spouse or partner has different wishes, indicate so.

When should the power become effective?

Immediately (after power is signed)

Springing (after two physicians have certified that you cannot make decisions)

Living Will: If two physicians have determined that you are in a permanent coma, irreversible vegetative state, etc., do you wish to receive life-sustaining treatment?

No, I do not want my life prolonged through artificial means.

Yes, I want to live as long as possible, regardless of expense.

Undecided. Let my health care agent decide for me based on the circumstances.

If you are in pain, would you want to receive treatment to relieve your pain, even if that could speed up your death?

Yes

No

Should your agent have power to donate your organs?

Yes

No

Limit to certain organs, tissues or parts?

Limit to certain purposes?

Transplant

Therapy

Research

Education

State your wishes regarding after-life activities (e.g. church service, burial vs. cremation, final disposition of remains). If you prefer, you can let your agent decide.

Do you have any other wishes or special instructions?

Please indicate where your spouse's or partner's wishes differ from yours in the above section.

Fiduciary and Beneficiary Information

Provide the address and phone number of all fiduciaries (trustees, executors, guardians and agents) and beneficiaries (except spouse/partner and children, grandchildren, etc. who have already been listed). Include birthdates for children, especially if you are establishing a trust for that child. If you run out of room, attach additional pages.

Name

Relationship

Telephone Number

Address

Name

Relationship

Telephone Number

Address

Name

Relationship

Telephone Number

Address

Name

Relationship

Telephone Number

Address

Name

Relationship

Telephone Number

Address

Name

Relationship

Telephone Number

Address

M. Property Information

Home and other real estate (a copy of the deed, with legal description, will be required.)

Property 1 Address

How is it titled?

Purchase Price

Current Value

Property 2 Address

How is it titled?

Purchase Price

Current Value

Property 3 Address

How is it titled?

Purchase Price

Current Value

Bank Accounts (checking, savings, CDs, money market, etc.)

Bank & Account Type 1

How is it Titled?

Account Number

Current Value

Bank & Account Type 2

How is it Titled?

Account Number

Current Value

Bank & Account Type 3

How is it Titled?

Account Number

Current Value

Equities (stocks, bonds, mutual funds, etc.)

Company 1

How is it Titled?

Account Number

Current Value

Company 2

How is it Titled?

Account Number

Current Value

Company 3

How is it Titled?

Account Number

Current Value

Life Insurance Policies

Policy 1: Company, Policy Type,
Policy Number

Policy Owner

Beneficiary

Cash Value

Death Benefit

Policy 2: Company, Policy Type,
Policy Number

Policy Owner

Beneficiary

Cash Value

Death Benefit

Policy 3: Company, Policy Type,
Policy Number

Policy Owner

Beneficiary

Cash Value

Death Benefit

Retirement Accounts (pension, IRA, 401(k), 403(b), 457, profit-sharing, etc.)

Account 1 Type

Owner

Beneficiary

Current Value

Account 2 Type

Owner

Beneficiary

Current Value

Account 3 Type

Owner

Beneficiary

Current Value

Business or Partnership Interests (provide a copy of corporate/partnership documents)

Description 1

How is it Titled?

Purchase Price

Current Value

Description 2

How is it Titled?

Purchase Price

Current Value

Money owed to you (provide a copy of any promissory note or other contract)

Description

Current Value

Personal Property

Home furnishings, clothing, tools and equipment, etc.

Current Value

Significant collections (antiques, art, coins, furs, stamps, jewelry, wine, etc.)

Purchase Price

Current Value

Cars (list by make and model)

Purchase Price

Current Value

Other vehicles (planes, boats, RVs, etc.)

Purchase Price

Current Value

Debts (mortgages, loans, other substantial debts)

Description 1

Current Value

Description 2

Current Value

Description 3

Current Value

N. How did you hear about The Law Office of Nicole A. Davidson?

Referred by

Attended seminar at

Other