

Instructions: Please complete as much of this form as you can before our meeting. 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. Tax Considerations

1. a. Total taxable gifts made to date

b. Unified tax credit

2. Generation-skipping transfer tax
exemption used

G. 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

H. Irrevocable Life Insurance Trust Questions

Purpose of Trust (check all that apply)

Provide a liquid source of funds to pay estate tax or other liabilities

Ensure that spouse, issue or other dependents will be cared for

Create a legacy for beneficiaries

Provide for centralized management and control of insurance periods

Trustees (in order of preference)

Name

Relationship

Name

Relationship

Name

Relationship

Name

Relationship

Beneficiaries

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

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.

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.

Trustee and Beneficiary Information

Provide the address and phone number of all trustees and beneficiaries (except spouse/partner and children, grandchildren, etc. who have already been listed). 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

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

Referred by

Attended seminar at

Other