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# Agnew Law Office, P.C.

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*A Family Estate Planning Law Firm*

## ***ESTATE PLANNING PERSONAL INFORMATION***

CONFIDENTIAL  
COVERED BY ATTORNEY-CLIENT PRIVILEGE

### BACKGROUND INFORMATION:

First Name \_\_\_\_\_

Middle Name \_\_\_\_\_

Last Name \_\_\_\_\_

Preferred Name \_\_\_\_\_

Birth Date \_\_\_\_\_

Soc. Sec. # \_\_\_\_\_

Status ☐ Single ☐ Widow/Widower ☐ Divorced ☐ Civil Union

### RESIDENCE:

Street \_\_\_\_\_

City \_\_\_\_\_ State, County \_\_\_\_\_

Home Phone \_\_\_\_\_ Zip Code \_\_\_\_\_

Cell Phone \_\_\_\_\_ E-mail \_\_\_\_\_

## CHILDREN (and Grandchildren):

### CHILD #1

|                                  |       |      |
|----------------------------------|-------|------|
| Name:                            |       |      |
| Birth Date:                      |       | Age: |
|                                  | ----- |      |
| Grandchildren<br>(If Applicable) | ①     |      |
|                                  | ②     |      |
|                                  | ③     |      |

### CHILD #2

|                                  |       |      |
|----------------------------------|-------|------|
| Name:                            |       |      |
| Birth Date:                      |       | Age: |
|                                  | ----- |      |
| Grandchildren<br>(If Applicable) | ①     |      |
|                                  | ②     |      |
|                                  | ③     |      |

### CHILD #3

|                                  |       |      |
|----------------------------------|-------|------|
| Name:                            |       |      |
| Birth Date:                      |       | Age: |
|                                  | ----- |      |
| Grandchildren<br>(If Applicable) | ①     |      |
|                                  | ②     |      |
|                                  | ③     |      |

**CHILD #4**

|                                                |   |             |  |
|------------------------------------------------|---|-------------|--|
| <b>Name:</b>                                   |   |             |  |
| <b>Birth Date:</b>                             |   | <b>Age:</b> |  |
| <b>Grandchildren</b><br><i>(If Applicable)</i> | ❶ |             |  |
|                                                | ❷ |             |  |
|                                                | ❸ |             |  |

**CHILD #5**

|                                                |   |             |  |
|------------------------------------------------|---|-------------|--|
| <b>Name:</b>                                   |   |             |  |
| <b>Birth Date:</b>                             |   | <b>Age:</b> |  |
| <b>Grandchildren</b><br><i>(If Applicable)</i> | ❶ |             |  |
|                                                | ❷ |             |  |
|                                                | ❸ |             |  |

**CHILD #6**

|                                                |   |             |  |
|------------------------------------------------|---|-------------|--|
| <b>Name:</b>                                   |   |             |  |
| <b>Birth Date:</b>                             |   | <b>Age:</b> |  |
| <b>Grandchildren</b><br><i>(If Applicable)</i> | ❶ |             |  |
|                                                | ❷ |             |  |
|                                                | ❸ |             |  |