Agnew Law Office, P.C.

*A Family Estate Planning Law Firm*

# *ESTATE PLANNING FINANCIAL INFORMATION*

CONFIDENTIAL
COVERED BY ATTORNEY-CLIENT PRIVILEGE

*General Estimates of Values are Sufficient*
*Precise Values and Account Numbers are NOT Required*

***Client Name:*** ____________________

| | VALUE | OWNED BY | | |
|---|---|---|---|---|
| ***Bank Accounts*** | | | | |
| Checking | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Savings | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| CDs | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Money Market | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| ***Investment Assets*** | [Non-IRA or 401(k) Accounts- see next page for those] | | | |
| Mutual Funds | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Stocks | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Bonds | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| ________ | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| ***Real Estate*** | | | | |
| Residence | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Vacation | $________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Commercial | $________ | ❑ Husband | ❑ Wife | ❑ Joint |

### *Retirement Accounts*

| | | | |
|---|---|---|---|
| IRAs | $__________ | ❑ Husband | ❑ Wife |
| IRAs | $__________ | ❑ Husband | ❑ Wife |
| 401(k) | $__________ | ❑ Husband | ❑ Wife |
| 401(k) | $__________ | ❑ Husband | ❑ Wife |
| 403(b) | $__________ | ❑ Husband | ❑ Wife |
| Roth IRA | $__________ | ❑ Husband | ❑ Wife |
| __________ | $__________ | ❑ Husband | ❑ Wife |

### *Annuities*

| | | | | |
|---|---|---|---|---|
| Annuity | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Annuity | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |

### *Life Insurance* (Death Benefit)

| | | | | |
|---|---|---|---|---|
| Permanent | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Permanent | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Term | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Term | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |

### *Business Assets*

| | | | | |
|---|---|---|---|---|
| LLC | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| LLC | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Corporation | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Corporation | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| Partnership | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| __________ | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |

### *Stuff That Doesn't Fit Anywhere Else*

| | | | | |
|---|---|---|---|---|
| __________ | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |
| __________ | $__________ | ❑ Husband | ❑ Wife | ❑ Joint |

***Name of Financial Advisor:*** *(If Any)* ______________________________

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# *ESTATE PLANNING*
# *REAL ESTATE INFORMATION*

CONFIDENTIAL
COVERED BY ATTORNEY-CLIENT PRIVILEGE

**Client Name:**

| ADDRESS | STATE | PARCEL IDENTIFICATION NUMBER (PIN) |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**Please provide the last deed on record for the real estate listed above along with the most recent tax bill. If you don't have a copy of the last deed on record, you can obtain one by calling the county recorders office. To obtain a copy of the tax bill, you can call the county assessors office.*

***Please note a deed differs from a survey, a mortgage release and a mortgage satisfaction. For the most accurate information, we need the last deed on record.***