



CONFIDENTIAL WILLS/ESTATE CLIENT INFORMATION FORM

DATE _____ REFERRED BY _____

CLIENT'S INFORMATION

FULL LEGAL NAME _____ a/k/a _____
FIRST M.I. LAST

ADDRESS _____
STREET ADDRESS CITY STATE ZIP CODE

COUNTY _____ EMAIL ADDRESS _____ @ _____

TELEPHONE # Business () _____ ext. Home () _____ Cell () _____

DATE/PLACE OF BIRTH _____ AGE _____ SOCIAL SECURITY # _____

EMPLOYER _____

EMPLOYER'S ADDRESS _____
STREET ADDRESS CITY COUNTY STATE ZIP CODE
 Position/Title _____ How Long Employed _____

MARITAL STATUS _____ Single _____ Divorced _____ Married _____ Widowed

SPOUSE/SIGNIFICANT OTHER'S INFORMATION

FULL LEGAL NAME _____ a/k/a _____
FIRST M.I. LAST

TELEPHONE # Cellular () _____ Business () _____ Ext. _____

DATE/PLACE OF BIRTH _____ AGE _____ SOCIAL SECURITY # _____

EMPLOYER _____

EMPLOYER'S ADDRESS _____
STREET ADDRESS CITY COUNTY STATE ZIP CODE
 Position/Title _____ How Long Employed _____

CHILDREN'S INFORMATION

Full Legal Name	Date of Birth	Age
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

VALUE OF ASSETS _____ **MORE than \$3,500,000.00**

(list approx. amount)

\$ _____ House
 \$ _____ Other Realty
 \$ _____ Securities
 \$ _____ 401K/IRA
 \$ _____ CD's
 \$ _____ Money Market

_____ **LESS than \$3,500,000.00**

\$ _____ Autos
 \$ _____ Boats
 \$ _____ Jewelry
 \$ _____ Art/Collections/Memorabilia
 \$ _____ Life Insurance
 \$ _____ Savings/Checking