



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 # Cell () _____ 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

<u>Full Legal Name</u>	<u>Date of Birth</u>	<u>Age</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

<u>VALUE OF ASSETS</u>	<u>MORE than \$5,000,000.00</u>	<u>LESS than \$5,000,000.00</u>
(list approx. amount)	\$ _____ House	\$ _____ Autos
	\$ _____ Other Realty	\$ _____ Boats
	\$ _____ Securities	\$ _____ Jewelry
	\$ _____ 401K/IRA	\$ _____ Art/Collections/Memorabilia
	\$ _____ CD's	\$ _____ Life Insurance
	\$ _____ Money Market	\$ _____ Savings/Checking