

**SWEET & MAIER, S.C.**  
**PERSONAL INFORMATION**

*[Note: Will be kept confidential]*

**BACKGROUND INFORMATION:**

	<b>YOU</b>	<b>SPOUSE</b>
First Name	_____	_____
Middle Name	_____	_____
Last Name	_____	_____
Street Address	_____	_____
City, County, State	_____	_____
Email	_____	_____
Home Phone #	_____	_____
Cell Phone #	_____	_____
Date of Birth	_____	_____
Social Security #	_____	_____
Citizenship	_____	_____
Name of Employer	_____	_____
Work Phone #	_____	_____
Occupation	_____	_____

**CHILDREN**

Name: \_\_\_\_\_

Age: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Married: \_\_\_\_\_ Grandchildren: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Age: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Married: \_\_\_\_\_ Grandchildren: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Age: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Married: \_\_\_\_\_ Grandchildren: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Age: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Married: \_\_\_\_\_ Grandchildren: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Are any children not also children of current spouse? \_\_\_\_\_

Are there any children who have died? (If so, did they have children) \_\_\_\_\_

Are there any adopted children? YES or NO

Do any of your children or grandchildren require special needs? \_\_\_\_\_

**MISCELLANEOUS:**

***BENEFICIARIES:***

If you choose your children and one predeceases you do you want their share to go to their children (step/adopted children)?

If your family dies in a common catastrophe or your children predecease you who do you want to inherit?

**PERSONAL REPRESENTATIVES:** (Carryout your wishes within your Will)

Names, Addresses, Phone Numbers (You should have a few in mind in case the individual you name predeceases you)

**TRUSTEE:** (Carryout and manage the assets within your Trust upon your death)

Names, Addresses, Phone Numbers (You should have a few in mind in case the individual you name predeceases you)

**GUARDIAN:** (Person and or couple who will raise your minor children) Names, Addresses (You should have a few in mind in case the individual you name predeceases you)

If you name a couple and upon your death only one of them has survived you do you want that person to be the guardian as an individual?

**POWERS OF ATTORNEY/AGENTS:**

**Financial:** If you choose to have a financial power of attorney you will need to indicate who you are giving the power to. Spouses do not have to use the same agents. Make sure you are comfortable with the person you name managing your assets when you are no longer capable. Bring with you names, addresses and phone numbers of the individuals and any alternates.

**Medical:** If you choose to have a medical power of attorney you will need to name an agent who will carryout your wishes. Spouses do not have to use the same agents. Make sure you are comfortable with the person and that they are also comfortable in making the necessary decisions. Bring with you names, addresses and phone numbers of the individuals and at least one alternate.

**GIFTS:**

Are there any gifts of specific property (i.e. family heirlooms, jewelry, etc.) or cash that you would like to go to any specific individual(s) or organization(s), including charitable bequests?

<b>Gift</b>	<b>To</b>
1. _____	_____
2. _____	_____
3. _____	_____

**FINANCIAL INFORMATION**

*I do not need specific figures or account numbers. This is just to get an idea of potential tax consequences and to determine the best estate planning route. It is also a means to guarantee that you have named beneficiaries to your life insurance and/or 401k which match your intentions.*

<b>ASSET</b>	<b>HOW TITLED</b>	<b>VALUE (less debt)</b>
Home	_____	_____
Other Real Estate	_____	_____
Securities	_____	_____
Bank Accounts/ Certificates, etc.	_____	_____
Collectibles/ Antiques	_____	_____
Personal Property (Auto, Boat, Motorcycle, etc.)	_____	_____
Other	_____	_____

Do you have any Life Insurance? If so, who owns the policy and who is the beneficiary? \_\_\_\_\_

Do you have a retirement fund or 401k? If so who is the beneficiary and what is the approximate value? \_\_\_\_\_

Do you anticipate any substantial gifts or inheritance?      YES or NO  
\_\_\_\_\_

Are there any other questions or special circumstances you would like to discuss? \_\_\_\_\_  
\_\_\_\_\_