

**ESTATE PLANNING  
CLIENT INTAKE SHEET**

Date: \_\_\_\_\_ Price of Plan: \_\_\_\_\_

Name: \_\_\_\_\_ Social Security No: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Birthplace: \_\_\_\_\_

Name: \_\_\_\_\_ Social Security No: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Birthplace: \_\_\_\_\_

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

Telephone (H): \_\_\_\_\_ (W): \_\_\_\_\_

Employer (H): \_\_\_\_\_

Employer (W): \_\_\_\_\_

Children	Birth Date	Residence

Parents (H): \_\_\_\_\_ # of Siblings: \_\_\_\_\_

Parents (W): \_\_\_\_\_ # of Siblings: \_\_\_\_\_

Advisors: \_\_\_\_\_

# ASSETS

	JOINT	HIS	HERS	BENE.?	AMOUNT
Real Estate Equities					
Land Contracts/Payable Entities					
Land Contracts & Mortgages Rec.					
Registered Bonds					
Bearer Bonds					
Listed Stocks					
Bank Accounts or Cash Equivalents					
<b>Business</b>					
Proprietorship					
General Partnerships					
Limited Partnerships					
Syndicates					
Closely Held Corporate (Sub S)					
Corporate Owned or Cross Owned Insurance on Employee					
Unsecured Notes or Loans Receivable					

	JOINT	HIS	HERS	BENE.?	AMOUNT
Life Insurances					
Pension Plan (Death Benefit)					
Profit Sharing Plan					
Deferred Bonus					
Household Goods					
IRA's Keogh					
Salary Continuation Agreement					
Miscellaneous					
LESS- loans & Accounts Payables					
GROSS ESTATE					