

# Springer Bush & Perry P.C.

## ESTATE PLANNING INFORMATION SHEET

<b>Husband:</b>	<input type="text"/>	U.S. Citizen: YES <input type="radio"/> NO <input type="radio"/>	
Date/Place of Birth:	<input type="text"/>	Social Security #	<input type="text"/>
Employer:	<input type="text"/>	Occupation:	<input type="text"/>
Bus. Address:	<input type="text"/>	City	<input type="text"/>
State:	<input type="text"/>	Zip Code	<input type="text"/>
Business Telephone:	<input type="text"/>		
Business Fax #	<input type="text"/>		
<b>Wife:</b>	<input type="text"/>	U.S. Citizen: YES <input type="radio"/> NO <input type="radio"/>	
Date/Place of Birth:	<input type="text"/>	Social Security #	<input type="text"/>
Employer:	<input type="text"/>	Occupation:	<input type="text"/>
Bus. Address:	<input type="text"/>	State	<input type="text"/>
City:	<input type="text"/>	Zip Code	<input type="text"/>
Business Telephone #:	<input type="text"/>	Business Fax #	<input type="text"/>
Home Address:	<input type="text"/>	State:	<input type="text"/>
City:	<input type="text"/>	Zip Code	<input type="text"/>
Home Telephone #:	<input type="text"/>		
<b>Child 1</b>	<input type="text"/>	Child 1 Date of Birth:	<input type="text"/>
SS#	<input type="text"/>	Home:	<input type="text"/>
<b>Child 2</b>	<input type="text"/>	Child 2 Date of Birth:	<input type="text"/>
SS#	<input type="text"/>	Home:	<input type="text"/>
<b>Child 3</b>	<input type="text"/>	Child 3 Date of Birth:	<input type="text"/>
SS#	<input type="text"/>	Home:	<input type="text"/>
<b>Child 4</b>	<input type="text"/>	Child 4 Date of Birth:	<input type="text"/>
SS#	<input type="text"/>	Home:	<input type="text"/>
<b>Child 5</b>	<input type="text"/>	Child 5 Date of Birth:	<input type="text"/>
SS#	<input type="text"/>	Home:	<input type="text"/>

Are there any deceased children with issue surviving? Please briefly explain in the box provided below.

### Real Estate

<b>Personal Residence</b>	Owners: Husband <input type="radio"/> Wife <input type="radio"/> Joint <input type="radio"/>	
Purchase Price: <input type="text"/>	Mortgage Amount <input type="text"/>	Fair Market Value: <input type="text"/>
Address: <input type="text"/>		

City:  State:  Zip:

**Vacation Home:**

Owners: Husband  Wife  Joint

Purchase Price:  Mortgage Amount:  Fair Market Value:

Address:

City:  State:  Zip:

**Investment Real Estate:**

Owners: Husband  Wife  Joint

Purchase Price:  Mortgage Amount:  Fair Market Value:

Address:

City:  State:  Zip:

Total: \$

**Tangible Personal Property**

Description of Asset	Owner: Husband / Wife / Joint	Loan Value	Fair Market Value
Household Goods: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Automobile: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Automobile: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Automobile: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Boat/Trailer, etc.: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Jewelry: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TOTAL: \$

**Investments**

**Bank Accounts**

Name of Bank/Financial Institution	Owner: Husband / Wife / Joint	Account Number	Fair Market Value
Checking Account: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Checking Account: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings Account: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings Account: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate of Deposit: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate of Deposit: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Certificate of Deposit:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			TOTAL: \$ <input type="text"/>

**STOCKS AND BONDS**

Name of Stock or Bond	Owner: Husband / Wife / Joint	Account Number	Fair Market Value
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>
			TOTAL: \$ <input type="text"/>

**Life Insurance**

Name of Insurance Company	Owner	Beneficiary	Face Amount
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
			TOTAL: \$ <input type="text"/>

**Retirement - IRA's - Pensions**

Type of Retirement Benefit	Participant: Husband - Wife	Current Value	Projected Value
Asset	<input type="text"/>	<input type="text"/>	<input type="text"/>

Asset			
Asset			
Asset			
			TOTAL: \$

### Business Interests

Description	Ownership	Entity Corporation Partnership/ Sole Proprietorship	Fair Market Value
Asset			
Asset			
Asset			
Asset			
			TOTAL: \$

### Liabilities & Loans

Description	Name of Debt	Debtor	Face Amount
Creditor			
Creditor			
Creditor			
Creditor			
Creditor			
			TOTAL: \$

Description	Husband	Wife	Joint	Total
Liabilities				
Liabilities and Loans				
Total Debts & Expenses				
<b>NET ESTATE</b>				