TALIS LAW PLLC

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CLIENT ESTATE PLANNING INFORMATION WORKSHEET

A. PERSONAL

1. Full Name ____

2. Addresses
   a. Home ____
   b. Mailing ____

3. Telephone
   a. Home ____
   b. Cell ____
   c. Work ____

4. Email Address ____

5. Birthdate ____

6. Citizenship ____

B. PRIOR MARRIAGES (If applicable)

1. Former Spouse ____

2. Terminated by
   Death/Divorce on ____

3. Obligations to or

4. from former spouse ____

5. Child Support ____

6. Separate Maintenance ____

C. CHILDREN

1. Living Children

a. Name ____________________ Date of Birth: ____________________
Street ____________________ Telephone No. ____________________
City St Zip ____________________

b. Name ____________________ Date of Birth: ____________________
Street ____________________ Telephone No. ____________________
City St Zip ____________________

c. Name ____________________ Date of Birth: ____________________
Street ____________________ Telephone No. ____________________
City St Zip ____________________

d. Name ____________________ Date of Birth: ____________________
Street ____________________ Telephone No. ____________________
City St Zip ____________________

****If you have more children, please attach a separate page to this worksheet*****

2. Deceased Children who have surviving children

a. ____

b. ____

D. CURRENT ESTATE PLANNING DOCUMENTS

Do you have any estate planning documents, such as a will, revocable trust, durable powers of attorney, or health care directives, not prepared by our office? ____________________

If yes, please provide copies either when we meet or when you return this worksheet

E. TRUSTS

1. Does any member of your family receive income from any trust? ____________________

If yes, who created the trust? ____

2. Have you ever created a trust, except as part of a Will? ____________________

If yes, give details. ____

3. Do you expect to be named a beneficiary or remainder beneficiary of a trust? __________

If yes, please describe: ____

Please provide copies of all trust documents, if available.

F. JOINT TENANCY ASSETS

Do you own any real or personal property as joint tenants with any third parties?

If so, please describe: ____

G. REAL ESTATE

1. Do you own any real estate in Washington?

   If so, please describe: ____

2. Do you own any real estate outside of Washington, including timeshare condominiums?

   If so, please describe: ____

H. GIFTS AND/OR INHERITANCES

1. Are your children likely to receive any gifts or inheritances? ____________________

2. Do you intend to make regular gifts to any person?

   If yes, please describe. ____

I. ASSET SCHEDULE

Please provide the approximate current value of each asset:

1.	Real Property	$____________________
2.	Stocks and Bonds	$____________________
3.	Checking/Savings	$____________________
4.	Life Insurance Death Benefits	$____________________
5.	Miscellaneous Property (including furniture, furnishings, antiques, Automobiles, boats, Collectibles, etc.)	$____________________
6.	Retirement Programs	$____________________

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	Subtotal	$____________________
	Less Liabilities	$____________________
	Net Worth (Approximate)	$____________________

J. WILL AND TRUST PROVISION INFORMATION

1. Personal Representative(s) (Administers will during probate)

   1st Choice: ____________________

   2nd Choice: ____________________

2. Trustee(s) (Manages a revocable trust or any trusts created under your will)

   1st Choice: ____________________

   2nd Choice: ____________________

3. Guardian(s) of Minor(s) (Raises children who are not yet age 18)

   1st Choice: ____________________

   2nd Choice: ____________________

4. Distribution of Trust Assets to Children (if applicable)

   Age for Distribution

   a. First Portion ____________________

   b. Second Portion ____________________

   c. Third Portion ____________________

5. Specific Bequests

   a. ____________________

   b. ____________________

   c. ____________________

6. Other Specific provisions or information to be included in Will, such as operation or provision for family business, etc.

   a. ____________________

   b. ____________________

   c. ____________________

   d. ____________________