



TALIS LAW PLLC

11911 NE 1<sup>st</sup> St., Suite 102  
Bellevue, WA 98005  
Phone (425) 943-9968  
Fax (425) 777-2097  
TALISLAWFIRM.COM

## 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 \$ \_\_\_\_\_

=====

Subtotal \$ \_\_\_\_\_

Less Liabilities \$ \_\_\_\_\_

Net Worth (Approximate) \$ \_\_\_\_\_

**J. WILL AND TRUST PROVISION INFORMATION**

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

1<sup>st</sup> Choice: \_\_\_\_\_

2<sup>nd</sup> Choice: \_\_\_\_\_

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

1<sup>st</sup> Choice: \_\_\_\_\_

2<sup>nd</sup> Choice: \_\_\_\_\_

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

1<sup>st</sup> Choice: \_\_\_\_\_

2<sup>nd</sup> 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. \_\_\_\_\_