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**ESTATE PLANNING QUESTIONNAIRE  
INDIVIDUALS (UNMARRIED)**

**BACKGROUND INFORMATION:**

Marital Status (check one): Unmarried _____ Separated/Divorced _____ Widowed _____
Check if there are either of the following agreements in existence (if so, provide a copy): Divorce/Property Settlement Agreement: _____ Palimony Agreement: _____
Name:
Date of Birth:
SS#:
Country of Citizenship:
Home Address:
Home Phone:
Work Address:
Work Phone:
Mobile Phone:
Fax:
E-mail Address:

**FAMILY INFORMATION:** (Please provide family information below):

<b>Children's Names:</b>	<b>Child's Date of Birth:</b>	<b>Spouse Name:</b>
<b>Grandchildren's Names:</b>	<b>Grandchild's Date of Birth:</b>	<b>Spouse Name:</b>
<b>Parents' Names:</b>	<b>If deceased, indicate dates of death:</b>	

**FINANCIAL INFORMATION:** (Please provide estimates of asset information and specify whether any are held jointly with another individual):

<b>Asset:</b>	<b>Value:</b>	<b>Individually-Owned</b>	<b>Joint:</b>
<b>Home</b>			
Value			
Mortgage Balance			
<b>Other Real Estate</b>			
Address:			
Value			
Mortgage Balance			
<b>Marketable Securities and Cash</b>			
<b>Business Interests</b>			

<b>Asset:</b>	<b>Value:</b>	<b>Individually-Owned</b>	<b>Joint:</b>
<b>Tangible personal property</b> (e.g. automobiles, jewelry, artwork and antiques)			
<b>Miscellaneous:</b>			
<b>Life Insurance</b> (provide death value, approximate cash value, company and policy information)			
Company Policy #			
Company Policy #			
Company Policy #			
<b>IRA, Other retirement, pension, profit plan or other employee plan</b>			
Company Account #:			
Company Account #:			
Company Account #:			
Company Account #:			

**OTHER QUESTIONS:**

1. What is your approximate annual income:
2. Do you receive income or any other interest in any trusts? (If so, please estimate the amount and provide a copy of the trust document, if available)
3. Have you previously filed gift tax returns? (If so please provide copies)
4. Have you been previously married? If so, are there any financial obligations to your former spouse(s) or children from that relationship? Please provide a copy of the property settlement agreement.