

CONFIDENTIAL

ESTATE PLANNING INFORMATION

COUPLE

a worksheet produced exclusively for the clients of

GODDARD & HAWKINS, P.C.

ATTORNEYS AT LAW

1444 BLAKE STREET
DENVER, CO 80202
PHONE: 303-292-3228
FAX: 303-292-1956

PERSONAL INFORMATION

YOU

SPOUSE

LEGAL NAME

OTHER NAMES USED

HOME ADDRESS

COUNTY

HOME PHONE

EMAIL ADDRESS

OCCUPATION

BUSINESS ADDRESS

BUSINESS PHONE

CELL PHONE

REFERRED BY

CHILDREN

NAME

DATE OF BIRTH

ADDRESS (IF NOT LIVING AT HOME)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Is there a possibility of additional natural or adopted children? Yes No (circle one)
Please note any adopted children and step-children.

OTHER BENEFICIARIES

NAME

RELATIONSHIP

DATE OF BIRTH
(IF A MINOR)

ADDRESS (CITY/STATE)

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

ESTIMATED PERSONAL BALANCE SHEET

ASSETS

If you bring a recent personal financial statement to the meeting, only fill out the insurance section at the end.

	<u>HUSBAND</u>	<u>WIFE</u>	<u>JOINT</u>
RESIDENCE	_____	_____	_____
OTHER REAL PROPERTY	_____	_____	_____
BANK ACCOUNTS AND CERTIFICATES	_____	_____	_____
RETIREMENT PLAN BENEFITS (IRA, 401(k), SEP)	_____	_____	_____
PUBLICLY TRADED STOCKS AND BONDS	_____	_____	_____
CLOSELY HELD STOCK & PARTNERSHIP INTERESTS	_____	_____	_____
AUTOMOBILES	_____	_____	_____
ART, STAMP, COIN OR OTHER COLLECTIONS	_____	_____	_____
MISCELLANEOUS HOUSEHOLD PROPERTY	_____	_____	_____
FACE VALUE OF LIFE INSURANCE	_____	_____	_____
OTHER (IDENTIFY)	_____	_____	_____
OTHER (IDENTIFY)	_____	_____	_____
TOTAL ASSETS	_____	_____	_____

TOTAL ESTATE ASSETS (COMBINED TOTALS OF HUSBAND, WIFE, AND JOINT)	\$
--	-----------

LIABILITIES

	<u>HUSBAND</u>	<u>WIFE</u>	<u>JOINT</u>
REAL ESTATE MORTGAGES	_____	_____	_____
OTHER LIABILITIES	_____	_____	_____
TOTAL LIABILITIES	_____	_____	_____
NET WORTH	_____	_____	_____

TOTAL NET WORTH (COMBINED TOTALS OF HUSBAND, WIFE, AND JOINT)	\$
--	-----------

INSURANCE

Detail of insurance listed above.

<u>Insured</u>	<u>Face Amount</u>	<u>Beneficiary</u>	<u>Owner (if different)</u>	<u>Company</u>	<u>Term or Whole</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

If you have time, please complete the following. Regardless, please review these two pages.

PERSONAL REPRESENTATIVES, GUARDIANS, AND TRUSTEES

PERSONAL REPRESENTATIVES

	NAME	ADDRESS
Initial	_____	_____
Successor(s)	_____	_____

GUARDIANS OF CHILDREN

	NAME	ADDRESS
Initial	_____	_____
Successor(s)	_____	_____

Will your choice of guardian be affected by the marriage, divorce, remarriage, or relocation of the persons named? _____

TRUSTEES OF CHILDRENS' TRUSTS

	NAME	ADDRESS
Initial	_____	_____
Successor(s)	_____	_____

PRIORITIES

What are your priorities in planning your estate? For example, estate taxes or guardians for children. Do you have any special concerns?

DISPOSITION OF ESTATE

What are your general desires as to the disposition of your estates? Indicate any specific gifts of cash or items you wish to make.

OTHER CONSIDERATIONS

Prior marriages, support or settlement obligations, prenuptial agreement, disabled children or beneficiaries.

POWERS OF ATTORNEY

Have you ever given power of attorney to another? _____ If so, to whom and when? _____

SPECIAL INSTRUCTIONS

Do you have special instructions regarding:

1. Living Will (life support) _____
2. Anatomical Gifts (organ donation) _____
3. Burial or Cremation _____

ADVISORS

Accountant _____
Financial Advisor _____
Insurance _____

PLEASE BRING TO THE MEETING

- ✓ Existing wills
- ✓ Any federal gift-tax returns
- ✓ Pre-nuptial and separation agreements
- ✓ Any trust in which you are a beneficiary
- ✓ Copy of warranty deed to any out-of-state real property you own