

NEW CLIENT - ESTATE INFORMATION

Are any of your children or grandchildren adopted? Yes No

Were you or your spouse previously married? Yes No
If yes, please furnish a copy of any divorce decree or property settlement agreement, or, if applicable, a copy of a former spouse's death certificate.

While married, have you acquired any property in a "community property" law state?
 (The nine community property law states are: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Washington, Wisconsin)
 Yes No

If yes, indicate which state and the years that you resided there. State: _____
 Years: _____

Do you currently have any of the following estate planning documents in place?:
**Please provide copies of these documents*

| | <u>STATE DRAFTED IN</u> | <u>DATE EXECUTED</u> |
|---------------------------|-------------------------|----------------------|
| Wills | _____ | _____ |
| Living Trusts | _____ | _____ |
| Durable Power of Attorney | _____ | _____ |
| Living Wills | _____ | _____ |
| Health Care Surrogate | _____ | _____ |
| Family Trust | _____ | _____ |
| Charitable Trust | _____ | _____ |
| Irrevocable Trust | _____ | _____ |

Are you or your spouse the income or principal Beneficiary of another trust created for your benefit? Yes No

Are there expected future inheritance(s) that should be considered in developing or reviewing your current estate or financial plans? Yes No

Are you considering relocating to another state? Yes No

If yes, when and which state? _____

OTHER PERTINENT INFORMATION

Have you or your spouse filed prior gift tax returns? Yes No
If yes, please furnish a copy of each return.

Have you or your spouse utilized any of your Unified credit during your lifetime? Yes No
If yes, please supply a copy of the gift tax return filed.

Pertaining to Florida Residents

Have you filed a Declaration of Florida Domicile? Yes No

If yes, when? _____

If no, when did you first claim to be a resident of Florida? _____

If no, do you want to file such a declaration? Yes No

Are any of your assets now located in a state other than Florida? Yes No

If yes, list assets and state:

| <u>ASSET</u> | <u>STATE</u> |
|---------------------|---------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

This client questionnaire is intended for general purposes only. All personal information provided remains confidential.