

## **NEW CLIENT - ESTATE INFORMATION**

Are any of your children or grandchildren adopted?				□ No
Were you or your spouse previously man If yes, please furnish a copy of ar agreement, or, if applicable, a cop	ny divorce decree or property s		□ Yes	□ No
While married, have you acquired any po (The nine community property law states Louisiana, Nevada, New Mexico, Washi	s are: Arizona, California, Idah	•	ate? □ Yes	□No
If yes, indicate which state and the years that you resided there.			State: _	
			Years: _	
Do you currently have any of the followir *Please provide copies of these docume		in place?:		
	STATE DRAFTED IN	DATE E	XECUTE	<u>:D</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?				□ No
If yes, when and which state?				

## **ESTATE PLANNING OBJECTIVES**

In the space provided below briefly define your ESTATE PLANNING OBJECTIVES and specify any special family needs. Perhaps your goals are to provide a comfortable income for your spouse after your death, to educate your children, to assist in the education of your grandchildren, to assure that an elderly relative or a handicapped child is taken care of, to give control of a family business to family members, to make sure that title to a vacation home remains in the family, or to provide for charity. Use words you can identify with. Given proper study of this information, a well thought out plan can be carefully and properly set up for you.

Please include names of estate plan.	charity(s), other	person(s), or	relative(s)	whom you wish to	o include in your

## **OTHER PERTINENT INFORMATION**

Have you or your spouse filed prior gift tax returns?  If yes, please furnish a copy of each return.		□ No
Have your or your spouse utilized any of your Unified credit during your lifeting the state of t	me? □ Yes	□ No
*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>	STATE	
<del></del>		_
<del></del>		_
		_

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