

**Primary Client**

**John L. Smith**

5108 Sample Way

Atlanta, Georgia 30303

Home: 770-555-5589    Work: 404-555-0573    Cell: 404-292-0663    Fax: 770-777-1444

Email: [BSmith@aol.com](mailto:BSmith@aol.com)

Date of Birth: January 22, 1936

Social Security Number: XXXX-XX-2229

**Secondary Client**

**Jane K. Smith**

*Spouse*

5108 Sample Way

Atlanta, Georgia 30303

Home: 770-555-5589    Work: 404-555-0573    Cell: 404-292-0663    Fax: 770-777-1444

Email: [ASmith@yahoo.com](mailto:ASmith@yahoo.com)

Date of Birth: December 22, 1938

Social Security Number: XXXX-XX-2277

## **Estate Settlement Information**

### **John**

**Executor Name: Jane Smith**

**Name of Trustee: Jane Smith**

**Do you have a Will? Yes**

**Do you have a Revocable Living Trust? No**

**Do you have a Durable General Power of Attorney? Yes**

**Do you have a Health Care Power of Attorney? Yes**

**Do you have a Living Will? Yes**

**Have you considered Burial or Cremation? Burial**

### **Jane**

**Executor Name: John Smith**

**Name of Trustee: John Smith**

**Do you have a Will? Yes**

**Do you have a Revocable Living Trust? No**

**Do you have a Durable General Power of Attorney? Yes**

**Do you have a Health Care Power of Attorney? Yes**

**Do you have a Living Will? Yes**

**Have you considered Burial or Cremation? Burial**

## *Children and Heirs*

**Christine A. Smith***Daughter**Send Key Contact List? Yes*

*1165 Imaginary Lane Apt.5  
San Francisco, California 93200  
Home: 1-415-555-5553      Cell: 1-415-555-5550  
Date of Birth: March 8, 1963  
Social Security: XXXX-XX-0555  
Email: [CSmith@yahoo.com](mailto:CSmith@yahoo.com)*

**Robin Stephens***Daughter**Send Key Contact List? No*

*1165 Imaginary Lane Apt.5  
San Francisco, California 93200  
Home: 1-415-555-5553      Cell: 1-415-555-5550  
Date of Birth: March 8, 1963  
Social Security: XXXX-XX-0555  
Email: [RHood@yahoo.com](mailto:RHood@yahoo.com)*

**Darren Smith***Son**Send Key Contact List? No*

*1435 Helpful Hollow  
Los Angeles, California 90210  
Home: 1-455-555-5654      Cell: 1-455-555-5987  
Date of Birth: March 11, 1968  
Social Security: XXXX-XX-0555  
Email: [DSmith@aol.com](mailto:DSmith@aol.com)*

**Primary Residence**

	<u>Value</u>	<u>Debt</u>	<u>Net Value</u>
Owner: John 5108 Sample Way Atlanta, Georgia 30303	\$350,000	(\$150,000)	\$200,000

***Mortgage Company:******Wells Fargo***

PO Box 1133

St. Louis, MO 30192

800-234-5555

Loan Number: 5225-655-9888

***Insurance Company:******State Farm***

111 State Farm Way

San Francisco, CA 34449

800-444-9898

Policy Number: 75-655-3221

**Special Personal Items**

***Owner: John and Jane***

*Item Description: Ming Vase*

*Value: \$50,000*

*Insured: Yes*

*Location: Residence*

***Owner: Jane***

*Item Description: 4 Carat Diamond Ring*

*Value: \$30,000*

*Insured: Yes*

*Location: Residence*

## Investment Information

Value

**Owner: John**

**Investment Type: Stock/Bond/Mutual Fund**

Tax Status: Non-Qualified

Self Held: No

**Institution: Fidelity Investments**

Description: Individual

5000 Banking Avenue

Boston, MA 45456

Phone: 800-775-8300

Account Number: 368-555-912

**Value**

**\$321,050**

**Owner: John**

**Investment Type: Mutual Fund**

Tax Status: Non-Qualified

Self Held: No

**Institution: Schwab Investments**

Description: Individual

2322 Schwab Court

Boston, MA 55456

Phone: 800-555-9898

Account Number: 658-555-944

**Value:**

**\$221,050**

## **Business Interests**

### **Value**

**Owner: John**

**Name of Company: Georgia Metal Fabrication, Inc**

Percent Owned: 50%

Type of Corporation: S Corporation

Address: 8900 Glenridge Boulevard

Atlanta, Georgia 30341

Phone: 404-855-4561

**Personal Value in Company**

**\$2,500,000**

### **Partner Information**

**Partner: Frank Johnson**

Percentage of Ownership: 50%

Is there a Buy/Sell Agreement in Place?: Yes

## **Advisor Information**

**Attorney Name: Steve Parker**

Type of Attorney: Tax Law

Firm Name: Mazursky and Dunaway

Phone: 404-555-5656

E-Mail: [sparker@mdlaw.com](mailto:sparker@mdlaw.com)

**Attorney Name: Mike Butler**

Type of Attorney: Business Law

Firm Name: Butler and Associates

Phone: 770-656-5656

E-Mail: [MButler@tblaw.com](mailto:MButler@tblaw.com)

**CPA Name: Dan Kurtz**

Firm Name: Kurtz and Associates

Phone: 404-555-5656

E-Mail: [dkurtz@kurtzcpas.com](mailto:dkurtz@kurtzcpas.com)

**Insurance Agent: Gerry Blackstone**

Firm Name: Blackstone & Associates, Inc

Phone: 248/650-2718

E-Mail: [gblackstone@earthlink.net](mailto:gblackstone@earthlink.net)

**Financial Advisor: Mike Williams**

Firm Name: Williams Financial Group, Inc.

Phone: 901-555-2114

E-Mail: [mike@wfg.com](mailto:mike@wfg.com)

**Primary Contact Physician: Dr. John Smith**

Phone: 404-555-5650

**Secondary Contact Physician: Dr. Cindy Sebastian**

Phone: 678-444-2222



## **Key Contact and Action List**

### ***Estate Settlement Services, Inc.***

2551 Roswell Rd, NE  
Suite 209  
Marietta, GA 30062  
770-973-5055  
1-877-286-6375 (At One Place)

### ***Williams Financial Group, Inc.***

Mike Williams  
500 Shilling Blvd, East, Suite 107  
Memphis, TN 38017-7078  
901-555-2114  
E-Mail: [mike@wfg.com](mailto:mike@wfg.com)

### ***Name of Funeral Home or Crematory: Watkins Funeral Home***

2355 Spring Street  
Atlanta, GA 30303  
404-566-8989  
E-Mail: [watkinsfh.com](mailto:watkinsfh.com)

### ***Place of Worship: North Georgia Baptist Church***

Clergy: Charles Stanley  
2355 Peachtree Street  
Atlanta, GA 30303  
404-566-8989  
E-Mail: [CStanley@aol.com](mailto:CStanley@aol.com)

### ***Burial Plot Location: North Georgia Memorial***

112 Cobb Court  
Marietta, GA 30067  
770-566-8989  
E-Mail: [NGM.com](mailto:NGM.com)