

ESTATE PLANNING WORKSHEET

The Law Offices of Jacqueline M. Real-Salas
Estate Planning and Administration

USING THIS ORGANIZER WILL HELP US UNDERSTAND YOUR PARTICULAR SITUATION. ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

IF POSSIBLE, PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE PRIOR TO YOUR APPOINTMENT VIA MAIL, E-MAIL OR FAX.

The Law Offices of Jacqueline M. Real-Salas

All Mail: 43460 Ridge Park Dr., Suite 245, Temecula, California 92590

Phone: (951) 212-5859 or (818) 468-2014 ♦ Fax: (951) 215-2591

E-Mail: office@realsalasalaw.com

PERSONAL INFORMATION

Husband's Legal Name _____
(name most often used to title property and accounts and as it appears on driver's license or passport)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Home Address _____

City _____ State _____ Zip _____

Telephone: Home: _____ Cell: _____ Business: _____

Employer _____ Position _____

Business Address _____

City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my _____

Date of Marriage _____

Wife's Legal Name _____
(name most often used to title property and accounts and as it appears on driver's license or passport)

Also Known As _____
(other names used to title property and accounts)

Prefer to be called _____ Birth date _____ SS# _____ US Citizen? _____

Home Address _____

City _____ State _____ Zip _____

Telephone: Home: _____ Cell: _____ Business: _____

Employer _____ Position _____

Business Address _____

City _____ State _____ Zip _____

E-mail Address _____ It is okay to communicate with me via my _____

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CHILDREN AND/OR OTHER FAMILY MEMBERS

(Use full legal name. Use "JT" if both spouses are the parents, "H" if husband is the parent, "W" if wife is the parent.)

Name	Birth date	Parent or Relationship
1. _____	_____	_____
Address: _____		Comments: _____
2. _____	_____	_____
Address: _____		Comments: _____
3. _____	_____	_____
Address: _____		Comments: _____
4. _____	_____	_____
Address: _____		Comments: _____

ADVISORS

Name	Telephone
Personal Attorney _____	_____
Accountant _____	_____
Financial Advisor _____	_____
Life Insurance Agent _____	_____

IMPORTANT FAMILY QUESTIONS

(Please check "Yes" or "No" for your answer)	Yes	No
Are you (or your spouse) receiving Social Security, disability, or other governmental benefits? <i>Describe</i> _____		
Are you (or your spouse) making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
If married have you and your spouse signed a pre- or post-marriage contract? <i>Please furnish a copy</i>		
Have you (or your spouse) been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you (or your spouse) ever filed federal or state gift tax returns? <i>Please furnish copies of these returns</i>		
Have (you or your spouse) completed previous will, trust, or estate planning? <i>Please furnish copies of these documents</i>		
Do you support any charitable organizations now that you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
Are there any other charitable organizations you wish to make provisions for at the time of your death? <i>If so, please explain below.</i>		
If married, have you lived in any of the following states while married to each other? <i>Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin</i>		
Are you (or your spouse) currently the beneficiary of anyone else's trust? <i>If so, please explain below.</i>		
Do any of your children have special educational, medical, or physical needs?		
Do any of your children receive governmental support or benefits?		
Do you provide primary or other major financial support to adult children or others?		

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ADDITIONAL RELEVANT INFORMATION

COMMUNITY AND SEPARATE PROPERTY

	HUSBAND	WIFE
Approximate net worth when married:		
Have either or both of you lived outside California during the marriage? If so, when and where?	<input type="checkbox"/> No, we have lived in California the entire time. <input type="checkbox"/> Yes. Please explain below.	
Have you entered into any prenuptial or property agreements <i>at any time</i> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide a copy of each agreement	
Description and value of any property received during marriage by gift or inheritance:		
Do you agree as to which assets are community property and which assets are the separate property of either spouse?	<input type="checkbox"/> Yes, we are in agreement. <input type="checkbox"/> No, we do not agree or we are not sure. Please explain below. Each of you should be sure to raise any questions you may have.	

EXPLANATION

SUMMARY OF ASSET VALUES

Amount *

Assets	Husband	Wife	Total Value (Net of Liens)
Real Property			
Furniture and Personal Effects			
Automobiles, Boats and RV's			
Bank and Savings Accounts			
Stocks and Bonds			
Life Insurance and Annuities			
Retirement Plans			
Business Interests			
Money owed to you			
Anticipated Inheritance, etc.			
Other Assets			
Total Assets:			
Unsecured Liabilities:	< >	< >	< >
TOTAL NET WORTH:			

**Describe joint property values 1/2 in husband's column and 1/2 in wife's column.*