

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

Client's Full 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 _____

Never Married

Divorced

Widowed

CHILDREN AND/OR OTHER FAMILY MEMBERS

Name

Birth date _____

1. _____

Address: _____

Comments: _____

2. _____

Address: _____

Comments: _____

3. _____

Address: _____

Comments: _____

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

4. _____

Address: _____ Comments: _____

5. _____

Address: _____ Comments: _____

6. _____

Address: _____ Comments: _____

7. _____

Address: _____ Comments: _____

8. _____

Address: _____ Comments: _____

ADVISORS

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

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

IMPORTANT FAMILY QUESTIONS

(Please check "Yes" or "No" for your answer)	Yes	No
Are you receiving Social Security, disability, or other governmental benefits? <i>Describe</i> _____		
Are you making payments pursuant to a divorce or property settlement order? <i>Please furnish a copy</i>		
Have you been widowed? <i>If a federal estate tax return or a state death tax return was filed, please furnish a copy</i>		
Have you ever filed federal or state gift tax returns? <i>Please furnish copies of these returns</i>		
Have you 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>		
Are you 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?		

ADDITIONAL RELEVANT INFORMATION

SUMMARY OF ASSET VALUES

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

Assets	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:	