

CONFIDENTIAL

College Plan Information Report

Date Completed: _____

The following information is necessary to properly evaluate your Estate Planning needs. Federal Estate Tax laws are highly complex. In order to take advantage of favorable laws to the fullest extent, the information provided must be as complete as possible. The attorney will assume that you have listed all of your assets on this report or on attachments. Any values, balances, or liabilities provided should be accurate estimates, keeping in mind that your attorney understands the amounts may change on a monthly basis. If you do not have enough room to answer any question that is indicated below, please feel free to attach a separate sheet.

PLEASE TYPE OR CAREFULLY PRINT

1. CLIENT INFORMATION

Client

Name: _____
(as it appears on driver's license or passport)

Social Security No: _____

Occupations: _____

Business Address: _____

Business Telephone: () _____

Date of Birth: _____

Place of Birth: _____

U. S. Citizen: _____

Residence Address: _____
Street

State

Residence Telephone: () _____

Cell Phone: () _____

e-mail: _____

2. FAMILY INFORMATION

Please list parents, brothers, sisters, grandparents, and others (if relevant). It is only relevant to list these family members if they will be receiving something from your estate or participating in the management of your assets or health care decisions.

FOR CLIENT

Name	Address	Relationship	Age
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

3. INFORMATION FOR DOCUMENTS

A. Upon my death I want my entire estate to go to the following individuals:

B. I want the following person to handle my financial affairs:

1. _____, if this person cannot act then the next person listed below shall act as my agent for financial decisions:

2. _____

C. I want the following person to act as my health care agent, making all health care decisions for me:

1. _____, if this person cannot act then the next person listed below shall act:

2. _____

I hereby declare that my assets do not exceed \$150,000.00 and therefore a Revocable Living Trust is not necessary.

Dated: _____