

ESTATE PLANNING INFORMATION WORKSHEET

PERSONAL & CONFIDENTIAL

Client 1:		
Legal Name: (First Middle Last):		
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female	Cell Phone:	
Date of Birth:	Social Security Number:	
E-mail Address:		
Occupation:		
Are you a Florida resident? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Are you a U.S. citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	If not, country of citizenship:	
Prior Marriage? <input type="checkbox"/> Yes <input type="checkbox"/> No	Ended in <input type="checkbox"/> Death <input type="checkbox"/> Divorce	

Client 2: (If applicable/Married)		
Legal Name: (First Middle Last):		
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female	Cell Phone:	
Date of Birth:	Social Security Number:	
E-mail Address:		
Occupation:		
Are you a Florida resident? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Are you a U.S. citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	If not, country of citizenship:	
Prior Marriage? <input type="checkbox"/> Yes <input type="checkbox"/> No	Ended in <input type="checkbox"/> Death <input type="checkbox"/> Divorce	

Other Information		
Date of Marriage (If applicable):		
Physical Address:		
City/State:	County:	Zip:
Home Phone:		
Full Mailing Address (If different):		
Do you have minor children? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you have children/beneficiaries with special needs? <input type="checkbox"/> Yes <input type="checkbox"/> No Name(s):		
Do you have a pre or post nuptial agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Who is your Financial Advisor? <input type="checkbox"/> NA Name:		
Who is your CPA? <input type="checkbox"/> NA Name:		
Does our Firm represent members of your family or your business partners? <input type="checkbox"/> NA Name(s):		
Do you have estate planning documents? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what year? _____		
Have you filed a Gift Tax Return? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Have you declared bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you own an interest in a business? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you own rental property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Do you own out of state real estate? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Who recommended you to our Firm?		
Additional Special Notes:		

ESTATE ASSET LIST

Client Name: _____ **Date:** _____

Homestead/Primary Residence:	Owner	Value	Mortgage

Investment/Personal Use Real Estate:	Owner	Value	Mortgage
1.			
2.			

Bank Accounts/ Money Markets/CDs:	Owner	Value
1.		
2.		
3.		
4.		

Stocks/Options/Brokerage Non-Retirement Accounts:	Owner	Value
1.		
2.		
3.		

Business Interests:	Owner	Value
1.		
2.		

Notes Payable To You:	Owner	Value
1.		
2.		

IRA/401K/Annuities:	Owner	Value	Beneficiary Designations:
1.			
2.			
3.			
4.			

Life Insurance:	Owner	Death Benefit	Beneficiary Designations:
1.			
2.			
3.			

Vehicles/Personal Property:	Owner	Value
1.		
2.		
3.		

I certify this is a true and correct representation of my assets and income as of this date.

Signature: _____

Date: _____

Signature: _____

Date: _____

DELOACH, P.L.

DIRECTIONS TO THE OFFICE

1206 EAST RIDGEWOOD STREET, ORLANDO, FLORIDA 32803

TELEPHONE: (407) 480-5005 FAX: (407) 480-5025

From Windermere:

- Take I-4 East towards Downtown.
- Take exit 83A, SR 50 (Colonial Dr.), US 17/92 (Amelia St.)
- Turn right on to Mills Avenue.
- Turn left on to Ridgewood Street, which is the first street after the traffic light at Livingston Street.
- Our building is immediately on the right.

From South Orlando:

- Head north on Orange Avenue towards Downtown.
- Turn right on to Robinson Street.
- Turn left on to Mills Avenue.
- Turn right on to Ridgewood Street.
- Our building is immediately on the right.

From Winter Park, Altamonte, or Lake Mary:

- Take I-4 West towards Downtown.
- Take exit 84A, US-17/Colonial Drive/US-92/SR-50.
- Turn left on to Colonial Drive/SR-50.
- Turn right on to Mills Avenue.
- Turn left on to Ridgewood Street, which is the first street after the traffic light at Livingston Street.
- Our building is immediately on the right.

From the East-West Expressway:

- Take exit 11B, Mills Avenue/State Road 15.
- Turn North on to Mills Avenue (left if you were heading east on the Expressway; right if you were heading west).
- Follow Mills as it curves around a lake and changes names.
- Turn left on to Central Boulevard.
- Turn right on to Mills Avenue.
- Turn right on to Ridgewood, which is the first street after the traffic light at Robinson Street.
- Our building is immediately on the right.

1206 East Ridgewood Street • Orlando, Florida 32803
407.480.5005 Telephone • 407.480.5025 Facsimile
www.deloachplanning.com