

Date _____

ESTATE PLAN DATA
(Husband + Wife)

| | | |
|------------------|------------|----------------|
| <u>Client(s)</u> | <u>Age</u> | <u>Address</u> |
| H _____ | _____ | _____ |
| W _____ | _____ | _____ |

| | |
|------------------------------------|----------------------|
| <u>Prior Marriages/Citizenship</u> | <u>Phone Numbers</u> |
| H _____ | Home _____ |
| W _____ | H Work _____ |

| | |
|------------------------|--------------|
| <u>Email Addresses</u> | H Cell _____ |
| H Work _____ | W Work _____ |
| H Other _____ | W Cell _____ |
| W Work _____ | H Fax _____ |
| W Other _____ | W Fax _____ |

FAMILY

| CHILDREN | AGE | DATE OF BIRTH | MARITAL STATUS | CHILD OF H, W OR HW | SPOUSE | NO. OF CHILD'S CHILDREN |
|----------|-----|---------------|----------------|---------------------|--------|--------------------------|
| | | | | | | |
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| | | | | | | |
| PARENTS | AGE | DATE OF DEATH | MARITAL STATUS | PARENT OF H OR W | SPOUSE | NO. OF PARENT'S CHILDREN |
| | | | | | | |
| | | | | | | |
| | | | | | | |

REAL ESTATE

| PROPERTY | MARKET VALUE | MORTGAGE BALANCE | EQUITY (MV - MB) | EQUITY H | EQUITY W | EQUITY HW |
|--------------|--------------|------------------|------------------|----------|----------|-----------|
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| | | | | | | |
| | | | | | | |
| TOTAL | | | | | | |

RETIREMENT ASSETS

| ACCOUNT TYPE (IRA/401K/PENSION/OTHER) | MARKET VALUE H-OWNED | MARKET VALUE W-OWNED | PRIMARY BENEFICIARY | SECONDARY BENEFICIARY |
|--|---------------------------------|---------------------------------|--------------------------------|----------------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| TOTAL | | | | |

OTHER ASSETS OR (LIABILITIES)

| ITEM | H | W | HW |
|--------------|----------|----------|-----------|
| | | | |
| | | | |
| | | | |
| | | | |
| TOTAL | | | |

RECAP – NOT TO BE COMPLETED BY CLIENT

| ITEM | H | W | HW | OTHER | TOTAL |
|-----------------------|----------|----------|-----------|--------------|--------------|
| REAL ESTATE | | | | | |
| NON-RETIREMENT ASSETS | | | | | |
| LIFE INSURANCE | | | | | |
| RETIREMENT ASSETS | | | | | |
| OTHER ASSETS | | | | | |
| (LIABILITIES) | | | | | |
| TOTAL | | | | | |

ESTATE TAX – ESTIMATED – NOT TO BE COMPLETED BY CLIENT

| | GROSS ESTATE | IL TAX | US TAX | US/IL TAX |
|--------------------|---------------------|---------------|---------------|------------------|
| NO TAX PLAN | | | | |
| FAMILY TRUST | | | | |
| INSURANCE TRUST | | | | |
| OTHER | | | | |
| TAX SAVINGS | | | | |