

Date \_\_\_\_\_

**ESTATE PLAN DATA**  
(Single)

**Client** \_\_\_\_\_ **Age** \_\_\_\_\_ **Address** \_\_\_\_\_

**Marital Status/Prior Marriages/Citizenship** \_\_\_\_\_ **Phone/Fax Numbers** \_\_\_\_\_

**Email Addresses** \_\_\_\_\_ **Cell** \_\_\_\_\_  
**Work** \_\_\_\_\_ **Other** \_\_\_\_\_

**FAMILY**

CHILDREN	AGE	DATE OF BIRTH	MARITAL STATUS	OCCUPATION	SPOUSE	NO. OF CHILD'S CHILDREN
PARENTS	AGE	DATE OF DEATH	MARITAL STATUS	OCCUPATION	SPOUSE	NO. OF PARENT'S CHILDREN
SIBLINGS	AGE	DATE OF DEATH	MARITAL STATUS	OCCUPATION	SPOUSE	NO. OF SIB'S CHILDREN

**REAL ESTATE**

PROPERTY	MARKET VALUE	MORTGAGE BALANCE	EQUITY (MV - MB)	INDIVIDUAL TITLE	TRUST TITLE
<b>TOTAL</b>					



**RETIREMENT ASSETS**

<b>ACCOUNT TYPE (IRA/401K/PENSION/OTHER)</b>	<b>MARKET VALUE</b>	<b>PRIMARY BENEFICIARY</b>	<b>SECONDARY BENEFICIARY</b>
<b>TOTAL</b>			

**OTHER ASSETS OR (LIABILITIES)**

<b>ITEM</b>	<b>MARKET VALUE</b>	<b>COST BASIS</b>	<b>GAIN/(LOSS)</b>
<b>TOTAL</b>			

**RECAP – NOT TO BE COMPLETED BY CLIENT**

<b>ITEM</b>	<b>H</b>	<b>W</b>	<b>HW</b>	<b>OTHER</b>	<b>TOTAL</b>
REAL ESTATE					
NON-RETIREMENT ASSETS					
LIFE INSURANCE					
RETIREMENT ASSETS					
OTHER ASSETS					
(LIABILITIES)					
<b>TOTAL</b>					

**ESTATE TAX – ESTIMATED – NOT TO BE COMPLETED BY CLIENT**

	<b>GROSS ESTATE</b>	<b>IL TAX</b>	<b>US TAX</b>	<b>US/IL TAX</b>
NO TAX PLAN				
INSURANCE TRUST				
OTHER				
<b>TAX SAVINGS</b>				