

Date \_\_\_\_\_

**ESTATE PLAN DATA**  
(Same Sex Couple)

<u>Client(s)</u>	<u>Age</u>	<u>Address</u>
SP1 _____	_____	_____
SP2 _____	_____	_____

<u>Marital Status/Prior Marriages/Citizenship</u>	<u>Phone Numbers</u>
SP1 _____	Home _____
SP2 _____	SP1 Work _____

<u>Email Addresses</u>	SP1 Cell _____
SP1 Work _____	SP2 Work _____
SP1 Other _____	SP2 Cell _____
SP2 Work _____	SP1 Fax _____
SP2 Other _____	SP2 Fax _____

**FAMILY**

CHILDREN	AGE	DATE OF BIRTH	MARITAL STATUS	CHILD OF 1, 2 OR BOTH	SPOUSE	NO. OF CHILD'S CHILDREN
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 SP1	EQUITY SP2	EQUITY JOINT
<b>TOTAL</b>						

**NON-RETIREMENT ASSETS**

<b>SECURITIES (LIST BY ACCOUNT – NOT INDIVIDUAL SEC'S)</b>	<b>MARKET VALUE SP1</b>	<b>MARKET VALUE SP2</b>	<b>MARKET VALUE JOINT</b>	<b>TOTAL</b>
<b>SUBTOTAL</b>				
<b>CASH (LIST BY ACCOUNT)</b>				
<b>SUBTOTAL</b>				
<b>OTHER</b>				
<b>SUBTOTAL</b>				
<b>COMBINED TOTAL</b>				

**LIFE INSURANCE**

<b>COMPANY</b>	<b>TERM END</b>	<b>CASH VALUE</b>	<b>POLICY OWNER</b>	<b>AMT ON SP1 LIFE</b>	<b>AMT ON SP2 LIFE</b>	<b>PRIMARY BENEFICIARY</b>	<b>SECONDARY BENEFICIARY</b>
<b>TOTAL</b>							

**RETIREMENT ASSETS**

<b>ACCOUNT TYPE (IRA/401K/PENSION/OTHER)</b>	<b>MARKET VALUE SP1-OWNED</b>	<b>MARKET VALUE SP2-OWNED</b>	<b>PRIMARY BENEFICIARY</b>	<b>SECONDARY BENEFICIARY</b>
<b>TOTAL</b>				

**OTHER ASSETS OR (LIABILITIES)**

<b>ITEM</b>	<b>SP1</b>	<b>SP2</b>	<b>JOINT</b>
<b>TOTAL</b>			

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

<b>ITEM</b>	<b>SP1</b>	<b>SP2</b>	<b>JOINT</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				
FAMILY TRUST				
INSURANCE TRUST				
OTHER				
<b>TAX SAVINGS</b>				