

MACK & MACK, ATTORNEYS

ESTATE PLANNING INFORMATION

Full Name: _____ **SSN:** _____

Date of Birth: _____ **Previous Marriages:** _____
Address: _____
Home Telephone: _____ **Work Telephone:** _____
E-mail Address: _____
Occupation: _____ **Employer:** _____
Annual Income: _____

Spouse's Full Name: _____ **SSN:** _____

Date of Birth: _____ **Previous Marriages:** _____
Address: _____
Home Telephone: _____ **Work Telephone:** _____
E-mail Address: _____
Occupation: _____ **Employer:** _____
Annual Income: _____

Family Information:

| Children's Full Name | Age | Marital Status Status | Names/Ages of Their Children |
|----------------------|-------|--------------------------|---------------------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Are any of the above children or grandchildren adopted? _____

Do any of the above children or grandchildren have disabilities or special needs? _____
If so, please provide details. _____

Do you and your spouse have an existing will or trust? _____
If so, where is the original located? _____

Do you or your spouse maintain a safe deposit box? _____
If so, where is it located and who has access to it? _____

Do you and your spouse have a pre-nuptial agreement or any other agreement which controls disposition of your assets in the event of death or divorce? _____

Do you or your spouse expect to receive an inheritance in the near future? _____
If so, please provide details. _____

Are you or your spouse the beneficiary of any trust? _____
If so, please provide details. _____

Are you or your spouse the trustee of any trust? _____
If so, please provide details. _____

Have you or your spouse made monetary gifts (or loans) to your children or grandchildren which you expect to be repaid or adjustment made in your ultimate distribution to them?
If so, please provide details. _____

Assets: Please estimate the amount or value of assets below placing each in the property ownership category.

| <u>Asset Type</u> | <u>Husband</u> | <u>Wife</u> | <u>Jointly Owned</u> |
|----------------------|----------------|-------------|----------------------|
| Cash | \$ _____ | \$ _____ | \$ _____ |
| Checking Accounts | \$ _____ | \$ _____ | \$ _____ |
| Savings Accounts | \$ _____ | \$ _____ | \$ _____ |
| Vehicles | \$ _____ | \$ _____ | \$ _____ |
| Personal Property | \$ _____ | \$ _____ | \$ _____ |
| Investment/Brokerage | \$ _____ | \$ _____ | \$ _____ |
| Bonds | \$ _____ | \$ _____ | \$ _____ |

| | | | |
|--|----------|----------|----------|
| Stocks | \$ _____ | \$ _____ | \$ _____ |
| Notes Receivable | \$ _____ | \$ _____ | \$ _____ |
| Pension, IRA, 401(k) [*] | \$ _____ | \$ _____ | \$ _____ |
| Primary Residence | \$ _____ | \$ _____ | \$ _____ |
| Other Real Estate in SC | \$ _____ | \$ _____ | \$ _____ |
| Real Estate Outside of SC | \$ _____ | \$ _____ | \$ _____ |
| Interest in Business, Corp. LLC's or Partnerships | \$ _____ | \$ _____ | \$ _____ |
| Other Property (Specify) | | | |
| _____ | \$ _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ | \$ _____ |
| TOTAL ASSETS | \$ _____ | \$ _____ | \$ _____ |

[*] Some of the above assets may have beneficiary designations, particularly retirement related accounts such as IRA's, 401(k)'s, etc. Please list on a separate page the beneficiary and alternate beneficiary of these accounts.

Insurance and Annuities:

| <u>Ins. Company</u> | <u>Insured</u> | <u>Beneficiary</u> | <u>Alt. Beneficiary</u> | <u>Coverage Amt.</u> |
|---------------------|----------------|--------------------|-------------------------|----------------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Liabilities:

| | <u>Husband</u> | <u>Wife</u> | <u>Jointly Owed</u> |
|-----------------------------|----------------|-------------|---------------------|
| Notes/Mortgages | | | |
| Primary Residence | \$ _____ | \$ _____ | \$ _____ |
| Other Property | \$ _____ | \$ _____ | \$ _____ |
| Vehicle Loans | \$ _____ | \$ _____ | \$ _____ |
| Credit Cards | \$ _____ | \$ _____ | \$ _____ |
| Life Insurance Loans | \$ _____ | \$ _____ | \$ _____ |
| Other Debt/Liens | \$ _____ | \$ _____ | \$ _____ |
| TOTAL LIABILITES | \$ _____ | \$ _____ | \$ _____ |

Net Worth: (Total Assets minus total liabilities)

| | | | |
|------------------|----------|----------|----------|
| NET WORTH | \$ _____ | \$ _____ | \$ _____ |
|------------------|----------|----------|----------|

Information Regarding Appointment of Personal Representatives, Trustees and Guardians:

List the individuals you have considered appointing as **Personal Representative** of your Last Will and Testament. The Personal Representative probates the will and administers the estate, paying the debts of the estate and ultimately distributing the assets to the beneficiaries.

| | <u>Husband</u> | <u>Wife</u> |
|---------------------------------------|----------------|-------------|
| Primary P.R. (usually spouse) | _____ | _____ |
| First Alternate Personal Rep. | _____ | _____ |
| Second Alternate Personal Rep. | _____ | _____ |

Please provide addresses and other contact information for the above.

List the individuals you have considered appointing as **Trustees** for any trusts created under your Last Will and Testament. The trust may be for your children or grandchildren and the Trustee, is responsible for distributing the trust assets to the beneficiaries under the terms and conditions you set for the trust.

| | <u>Husband</u> | <u>Wife</u> |
|--------------------------|----------------|-------------|
| Primary Trustee | _____ | _____ |
| First Alternate Trustee | _____ | _____ |
| Second Alternate Trustee | _____ | _____ |

Please provide addresses and other contact information for the above.

List the individuals you have considered appointing (if applicable) as **Guardians** for any minor children under your Last Will and Testament. The guardians are responsible for the care, custody and control of the minor children until they reach the age of eighteen.

| | <u>Husband</u> | <u>Wife</u> |
|----------------------------|----------------|-------------|
| Primary Guardians | _____ | _____ |
| First Alternate Guardians | _____ | _____ |
| Second Alternate Guardians | _____ | _____ |

Please provide addresses and other contact information for the above.

THIS FORM WILL PROVIDE OUR FIRM WITH THE BACKGROUND INFORMATION NECESSARY TO DISCUSS AND FORMULATE YOUR ESTATE PLANNING NEEDS. PLEASE COMPLETE THE FORM AS FULLY AND ACCURATELY AS POSSIBLE. THE FORM SHOULD BE FORWARDED TO OUR OFFICE PRIOR TO YOUR APPOINTMENT IN ORDER THAT IT MAY BE REVIEWED IN ANTICIPATION OF OUR MEETING. SHOULD YOU HAVE ANY QUESTION IN THIS REGARD PLEASE CONTACT US AT (803) 548-7200 OR BY EMAIL AT BARRYMACK@MACKANDMACKLAW.COM .