



FAMILY INFORMATION WORKSHEET

To ensure proper drafting of your estate planning documents, please be sure to include full legal names and write as clearly as possible.

Client # 1 (If married couple: Husband)

Full Legal Name _____

Birth date _____ Social Security Number _____

Client # 2 (If married couple: Wife)

Full Legal Name _____

Birth date _____ Social Security Number _____

Child 1: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

Child 2: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

Child 3: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

Child 4: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

Child 5: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

Child 6: Full Legal Name _____

Male Female Child of: Both of Us Husband Wife Adopted Foster Child

Birth date _____ Single Married Divorced Address is same as ours

Address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Spouse's Name: _____ Number of Children: _____

OTHER FAMILY MEMBERS OR FRIENDS

Use this section to provide contact information for other dependents, family members or friends that you may be considering naming in your estate plan as either beneficiaries or potential "helpers" (i.e., executors, trustees, agents, guardians, etc.) If more space is needed, please attach additional pages.

Individual 1: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 2: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 3: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 4: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 5: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 6: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 7: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____

Individual 8: Full Legal Name _____

Home address _____ City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Male Female Relation: _____

Spouse's Name: _____ Spouse's Cell Phone: _____