

PERSONAL DATA FORM

GENERAL INFORMATION

DATE \_\_\_\_\_

Name		Date of Birth	Age
Address (Include city and state)		ZIP	County
Home Phone		Fax	
Office Phone		E-Mail	
Cell Phone			
Employer		Annual Income \$	
Social Security:			

Spousal Information

Spouse	Date Of Birth	Age
Employer	Office Phone	Cell Phone
Social Security:	Annual Income \$	

Any previous marriage(s) Husband \_\_\_\_\_ Wife \_\_\_\_\_

Have you signed any prenuptial or postnuptial agreements? Husband  Wife

Children-Name(s) & Address	Date of Birth	Married	Number of Children	Telephone Number	Prior Marriage
Other Beneficiaries:					

I was referred to Parker, Pollard, Wilton & Peaden, P.C. by: \_\_\_\_\_

Is either spouse receiving benefits from a trust or an estate? \_\_\_\_\_

List the amount of any inheritance you expect to receive: \$ \_\_\_\_\_

Advisors:	Name	Address	Phone
Accountant			
Life Insurance Agent			
Stock Broker			
Investment Advisor			

Location of safety deposit box:

Miscellaneous Problems (*Burial Instructions, prior gifts, prior will, etc.*)

Has client lived in community property state? (*Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, and Washington*) Yes  or No

U.S. Citizens: Yes  No

Have you ever filed a gift tax return? Yes  No

Have you ever made any gifts over \$13,000? Yes  No

**FINANCIAL DATA FORM**  
(Round off to nearest thousand)

*Please complete the Financial Data Form to the best of your ability. If you are uncertain about the correct amount for any account, you can discuss them with the attorney that meets with you.*

ASSETS	HUSBAND	WIFE	JOINT OR SINGLE
1. Real Estate (List Address)			
2. Checking			
3. Savings			
4. Stocks, Bonds and Mutual Funds			
5. IRA, 401K or other Retirement Accounts			
6. Business Interests			
7. Household Effects, Jewelry, Furniture, Antiques			
8. Automobiles and other assets			
9. Life Insurance Death Benefit			
<b>TOTALS</b>			

  

INSURANCE COMPANIES	KIND	POLICY	OWNER	BENEFICIARY	AMOUNT

  

LIABILITIES			
1. Mortgages			
2. Loans to Insurance			
3. Other Debts			
<b>TOTALS</b>			

  

STOCKS			

<b>ASSETS</b>	<b>LIABILITIES</b>
Husband _____	Husband _____
Wife _____	Wife _____
Joint _____	Joint _____
Total Assets _____	
Total Liabilities _____	
Net _____	

Use page 4 to list additional data.

