

I was referred to Parker, Pollard, Wilton & Peaden by: _____

Are you 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			
Trust Officer			
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

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.

FINANCIAL DATA FORM
(Round off to nearest thousand)

ASSETS		
1. Real Estate (List Address)		
2. Checking		
3. Savings		
4. Stocks		
5. Bonds		
6. Employee Benefits		
7. Individual Retirement Account (IRA)		
8. Business Interests		
9. Household Effects, Jewelry, Furniture, Antiques		
10. Life Insurance Face Value		
11. Automobiles and other assets		
TOTALS		
LIABILITIES		
1. Mortgages		
2. Notes to Banks		
3. Loans to Insurance		
4. Accounts Payable		
5. Others		
TOTALS		
STOCKS		
INSURANCE COMPANIES	KIND	POLICY

Total Assets: _____

Total Liabilities: _____

Use page 4 to list additional data.

OTHER SUPPLEMENTAL INFORMATION AND NOTES

1.
2.
3.
4.
5.
6.