PARKER, POLLARD, WILTON & PEADEN, P.C.
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:		

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 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.*)_

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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.