(T) 720-504-7709 🞘 (E) Nick@KlimasLaw.com

Klimas Law Firm, LLC

www.KlimasLaw.com

**Personal Information Form**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Husband** | | | **Wife** | |
| Full Legal Name |  | | |  | |
| Preferred Name |  | | |  | |
| Date of Birth |  | | |  | |
| Preferred Phone |  | | |  | |
| Email Address |  | | |  | |
| U.S. Citizen? |  | | |  | |
| If no, please specify |  | | |  | |
| Occupation |  | | |  | |
| Veteran? If yes, please specify brand and date of service |  | | |  | |
| **Couple’s Information** | | | | | |
| Home Address |  | | | | |
| Date of Marriage |  | | | | |
| Did you sign a Pre- or Post- marriage contract? | | |  | | |
| **Estate Planning Documents** Check any that you have previously completed | | | | | | |
|  | | | **Husband** | | | **Wife** |
| Will | | |  | | |  |
| Trust | | |  | | |  |
| Financial Power of Attorney | | |  | | |  |
| Medical Power of Attorney | | |  | | |  |
| HIPPA Release | | |  | | |  |
| Funeral Arrangements | | |  | | |  |
| Are you the beneficiary of any trust? | | |  | | |  |

**Family Information**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Children** | | | | |
| **Full Name** | **Gender** | **Date of Birth** | **Married?** | **Specify parent if not shared** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Do any of your children have special needs? If so, who? | | | | |
|  | | | | |
| Do you want your children to be your beneficiaries? If so, in what percentages to each? | | | | |
|  | | | | |
| Are there other beneficiaries besides your children? If so, what percentages to each? Specific gifts? | | | | |
|  | | | | |

**Agent Appointment**In the event of your incapacity or death, whom do you want making financial and medical decisions for you? Most clients choose their spouse as their first agent. After you complete you estate plan we will email your agents information regarding their roles.

|  |  |  |  |
| --- | --- | --- | --- |
| **Husband’s Agents** | | | |
| **Financial** | **Name** | **City, State** | **Email** |
| 1st Choice |  |  |  |
| 2nd Choice |  |  |  |
| **Medical** | **Name** | **City, State** |  |
| 1st Choice |  |  |  |
| 2nd Choice |  |  |  |
| **Wife’s Agents** | | | |
| **Financial** | **Name** | **City, State** | **Email** |
| 1st Choice |  |  |  |
| 2nd Choice |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Medical** | **Name** | **City, State** | **Email** | |
| 1st Choice |  |  |  | |
| 2nd Choice |  |  |  | |
| **Shared Agents-** In the event of the incapacity or death of both spouses. | | | | |
| **Guardian for Minor Children** | **Name** | **City, State** | **Email** | |
| 1st Choice |  |  |  | |
| 2nd Choice |  |  |  | |
| **Successor Trustee** | **Name** | **City, State** | **Email** | |
| 1st Choice |  |  |  | |
| 2nd choice |  |  |  | |
| Do you want Klimas Law Firm to contact your agents with more information on their roles? | | | **Yes** | **No** |
|  |  |
| If yes, are there any agents you do not want us to contact? If so, please list their names. | | | | |
|  | | | | |
|  | | | | |

**Miscellaneous Estate Planning Questions**

|  |  |  |
| --- | --- | --- |
|  | **Husband** | **Wife** |
| Have you ever filed state or federal gift tax returns? (check if yes) |  |  |
| Do any of your heirs owe you money? If so please specify the heir and amount. |  |  |
| Do you want this money to be repaid as part of their inheritance? |  |  |

**Asset Information**

|  |  |  |  |
| --- | --- | --- | --- |
| **Professional Advisors** | | | |
|  | **Name** | **Company** | **Email** |
| Accountant/CPA |  |  |  |
| Financial Advisor |  |  |  |
| Mortgage Holder |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Real Estate** Include all real estate interests including vacation homes, time shares and undeveloped land. | | | |
| **General Description and Address Note any property used for business purposes** | **Market Value** | **Loan Balance** | **Specify owner if not shared** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Intellectual Property** List trademarks, patents, registered designs, copyrights, or other intellectual property. | | |
| **Type** | **Value** | **Specify owner if not shared** |
|  |  |  |
|  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Bank Accounts** List all types of bank accounts including checking, savings, certificates of deposit, and money market accounts. Do not include IRAs or 401(k)s here. *Note: If an account is in your name for the benefit of a minor, please provide minor’s name.* | | | |
| **Account Type** | **Bank Name** | **Balance** | **Specify owner if not shared** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Money Owed To You** List any mortgages or promissory notes payable to you or other moneys owed to you. | | | | |
| **Name of Debtor** | **Date of Note** | **Maturity Date** | **Current Balance** | **Specify owner if not shared** |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Other Financial Accounts** List all stocks, bonds and investment accounts, as well as pension, profit sharing, H.R.10, IRA, SEP, and 401(k) plans. If held in a brokerage account, lump together on one line. | | | | | | | | | |
| **Type** | **Financial Institution** | | **Account Type / Plan Name** | | | | **Balance** | | **Specify owner if not shared** |
|  |  | |  | | | |  | |  |
|  |  | |  | | | |  | |  |
|  |  | |  | | | |  | |  |
| **Who are the designated beneficiaries of your retirement accounts and IRAs?** | | | | | | | | | |
| Primary | | | | | Secondary | | | | |
|  | | | | |  | | | | |
| **Life Insurance Policies and Annuities** List any type of life insurance policy such as term, whole, group, split dollar or annuity. Please also include any long term care policies. | | | | | | | | | |
| **Policy Owner (Initials)** | **Policy Type** | **Insurance Co and Agent** | | **Face Value Death Benefit** | | **Premium Payer** | | **Beneficiaries** | |
|  |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Business Interests** List any businesses such as general or limited partnerships, sole proprietorships, privately owned corporations, professional corporations, oil interests, and farm and ranch interests. | | | | |
| **Business Name and Type** | **Business’ Market Value** | **Owner** | **Percent Owned** | **Do you have a buy-sell agreement?** |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Anticipated Moneys** List any expected gifts or inheritances, and any money you expect from a lawsuit. | | | | | |
| **Source of Money or Property** | **When Will You Receive It?** | **Specify Recipient** | | **Value or Amount** | |
|  |  |  | |  | |
|  |  |  | |  | |
| **Are you currently being sued? If yes, pleas attach an explanation.** | | | | | |
| **Other Assets** List any other property you have that does not fit into the above categories. | | | | | |
| **Item / Description** | | | **Value** | | **Specify Owner** |
|  | | |  | |  |
|  | | |  | |  |

**GOALS**

Your Estate Plan should address all of your hopes, fears, and wishes, so use this space to explain your goals for the creation of your Estate Plan, as well as any other issues or questions you have.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have any deadlines we should be aware of (i.e. surgery or travel plans)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How did you hear about Klimas Law Firm?  
\_\_\_Google  
\_\_\_Facebook/Twitter  
\_\_\_Referred by\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
\_\_\_Other, please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Thank you for taking the time to provide this information so that we are able to provide you with the best service. Please contact Nick if you have any questions.**