

ESTATE PLANNING INTERVIEW REPORT

Hermenze & Marcantonio LLC

I. Family Data

Date: _____

Husband's Name

Wife's Name

Date of Birth

Cell Phone Number

Date of Birth

Cell Phone Number

U.S. Citizen?

Email Address

U.S. Citizen?

Email Address

Home Address: _____

Home Telephone: _____

Home Fax: _____

Prior Marriages?: _____

Children's Names

Date of Birth

Spouse's Name

Grandchildren-Names and Ages

Other Dependents: _____

Husband's Family: _____

Wife's Family: _____

Other family information, including any personal or immediate family health, financial or other problems: _____

Does Client have a Will or any Trust Agreements? Yes _____ No _____ [If yes, obtain copy]

Does Client have a Power of Attorney? Yes _____ No _____

If so, to whom? _____

II. Employment Data

H's Employer: _____

Title: _____

Business Address: _____

Phone: _____

W's Employer: _____

Title: _____

Business Address: _____

Phone: _____

Additional Information: _____

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III. List of Assets and Debts

Approximate Market Value

<u>Asset</u>	<u>Husband's Name</u>	<u>Wife's Name</u>	<u>Joint Name With Rights of Survivorship</u>
Primary residence	_____	_____	_____
Mortgage debt	_____	_____	_____
Other residences	_____	_____	_____
Mortgage debt	_____	_____	_____
Other real property	_____	_____	_____
Mortgage debt	_____	_____	_____
Tangible personal property (furnishings, antiques, artwork, jewelry, automobiles)	_____	_____	_____
Cash and cash equivalents	_____	_____	_____
Marketable securities	_____	_____	_____
Stocks	_____	_____	_____
Bonds	_____	_____	_____
Other	_____	_____	_____
Partnership Interests	_____	_____	_____
Closely-Held Businesses	_____	_____	_____
IRA	_____	_____	_____
Employee Benefits	_____	_____	_____
Vested Pension/Profit Sharing	_____	_____	_____
401(k) Plan	_____	_____	_____
Stock Option Plan	_____	_____	_____
Deferred Compensation (non-qualified)	_____	_____	_____
Group Life Insurance	_____	_____	_____
AD&D	_____	_____	_____
Other benefits	_____	_____	_____
Personal Life Insurance	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Other Assets	_____	_____	_____
Other Debts	_____	_____	_____