

## Confidential Information Form

Client's Name \_\_\_\_\_ Birthdate \_\_\_\_ - \_\_\_\_ - \_\_\_\_ SSN \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
                   (First)                   (Middle)                   (Last)

Spouse \_\_\_\_\_ Birthdate \_\_\_\_ - \_\_\_\_ - \_\_\_\_ SSN \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
                   (First)                   (Middle)                   (Last)

Residence Address \_\_\_\_\_ Client's Email \_\_\_\_\_

Spouse's Email \_\_\_\_\_

Home Phone (\_\_\_\_) \_\_\_\_\_ Client's Cell # (\_\_\_\_) \_\_\_\_\_ Spouse's Cell (\_\_\_\_) \_\_\_\_\_

Name of Employer \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_

Spouse's Employer \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_

Name of CPA/Tax Preparer \_\_\_\_\_ Life Insurance Agent \_\_\_\_\_

Investment Advisor \_\_\_\_\_ Home/Auto Insurance Agent \_\_\_\_\_

Name of Children	Address	Phone Number	Date of Birth	Marital Status <sup>1</sup>	Spouse's Name	No. of Grandkids
1. _____	_____	(____) _____	_____	_____	_____	_____
2. _____	_____	(____) _____	_____	_____	_____	_____
3. _____	_____	(____) _____	_____	_____	_____	_____
4. _____	_____	(____) _____	_____	_____	_____	_____
5. _____	_____	(____) _____	_____	_____	_____	_____

<sup>1</sup> S(Single), M(Married), W(Widowed), D(Divorced)

### Other Questions and Information

	Y	N
While you were married, did you ever live in any of the following states: (California/Arizona/Wisconsin/Idaho/Louisiana/New Mexico/Nevada/Texas/Washington)?		
Have you ever made gifts in excess of \$10,000 to any one person in any one year?		
Do you expect to receive any substantial inheritances soon (i.e. within the next 6 months)?		
Do you own any life insurance on anyone other than yourself and/or your spouse?		
Are either of you citizens of a country other than the United States?		
Do you file tax returns in any state other than in Virginia?		
Are you currently a trustee/executor/beneficiary/grantor of any estate or trust where you are actively managing assets or receiving income?		
Are any of the children not from this marriage?		
Do you have a premarital/post marital agreement?		
Is this your first and only marriage?		
Do you have any assets located outside the United States?		
Do you have any special wishes with regard to your pets?		
Do you have long term care insurance?		
Are you interested in organ donation?		
Do you have any outstanding loans with your children?		
Do any of your children have marital, drug, alcohol, or credit problems?		
Is it OK to send information via email - understanding there are no guarantees as to confidentiality?		

<b>Tangible Personal Property</b>			
	<b>Husband</b>	<b>Wife</b>	<b>Joint</b>
Vehicles	\$	\$	\$
Jewelry			
Furniture/Furnishings			
Other Items			
<b>Total</b>	\$	\$	\$

<b>Real Estate</b>					
	<b>Description</b>	<b>State</b>	<b>Husband's Name</b>	<b>Wife's Name</b>	<b>Joint</b>
Residence			\$	\$	\$
Vacation					
Timeshare					
Other					
<b>Total:</b>			\$	\$	\$

**Investments**

	Name of Bank/Institution	Husband	Wife	Joint
Checking Accounts:		\$	\$	\$
Savings Accounts:				
Money Market Accounts:				
CDs:				
Brokerage Accounts:				
Stocks (In Which You Hold Certificates):				
Mutual Funds:				
Closely Held Businesses (Corps/LLCs):				
<b>Total:</b>		\$	\$	\$

**Pension/IRA/401(k)/Profit-Sharing/ESOP, Etc.**

	<b>Type of Account IRA/401(k)/Etc.</b>	<b>Value</b>	<b>Bank/Institution</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary</b>
Husband		\$			
Husband					
Husband					
<b>Total for Husband</b>		\$			
Wife					
Wife					
Wife					
<b>Total for Wife</b>		\$			

**Life Insurance**

	<b>Insurance Company</b>	<b>Face Amount</b>	<b>Term/ Cash Value</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary</b>
Husband		\$			
Husband					
Husband					
<b>Total for Husband</b>		\$			
Wife		\$			
Wife					
Wife					
<b>Total for Wife</b>		\$			

**Other Assets**

Please list any other assets you may have which are not listed above such as options, notes, property owned jointly with someone other than your spouse.


**Liabilities - List the Current Outstanding Balance  
on all Your Liabilities Over \$10,000**

	Husband	Wife	Joint
Mortgage	\$	\$	\$
<b>Total</b>	\$	\$	\$

## Summary of Assets and Liabilities

	Husband	Wife	Joint
Tangible Personal Property	\$	\$	\$
Real Estate			
Investments			
Retirement Accounts			
Life Insurance			
Other Assets			
Less: Liabilities	( )	( )	( )
Net Estate	\$	\$	\$
<b>Combined Gross Estate (Add All Three Columns)</b>			\$