

BERNETICH, HATZELL & PASCU, LLC

LAW OFFICES

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ESTATE PLANNING – INQUIRY SHEET

TELEPHONE
(856) 795-3535

FACSIMILE
(856) 795-3322

Today's Date: _____

NAME: _____ S.S. NO. _____ U.S. CITIZEN: YES NO

SPOUSE: _____ S.S. NO. _____ U.S. CITIZEN: YES NO

HOME ADDRESS: _____

OFFICE ADDRESS: _____

BIRTH DATE: _____ SPOUSE'S BIRTH DATE: _____

TELEPHONE: Home: _____ Office: _____ Cell: _____ FAX: _____

EMAIL ADDRESS(ES): _____

Names of Children (indicate if step-child) and other Dependents	Birth Date	Marital Status	Spouse's Name	Grandchildren (Attach list if necessary)

Do any individuals have special needs? _____ Yes _____ No

TYPE OF ASSET	DESCRIPTION (Please (i) list the value in appropriate columns to right; (ii) attach separate itemized lists as needed)	ASSET OWNED BY HUSBAND	ASSET OWNED BY WIFE	ASSET OWNED JOINTLY
REAL ESTATE residence, business, other				
SECURITIES stocks, bonds, mutuals				
CASH bank a/c's, receivables, money markets				
RETIREMENT ACCOUNTS				

BUSINESS INTERESTS														
PERSONAL EFFECTS														
OTHER ASSETS, POTENTIAL INHERITANCE, ETC.														
LIFE INSURANCE	<table border="1"> <thead> <tr> <th data-bbox="282 548 386 575">Insured</th> <th data-bbox="386 548 553 575">Company Name</th> <th data-bbox="553 548 675 575">Cash Value</th> <th data-bbox="675 548 797 575">Beneficiary</th> <th data-bbox="797 548 919 575">Policy Nos.</th> </tr> </thead> <tbody> <tr> <td data-bbox="282 575 386 779"></td> <td data-bbox="386 575 553 779"></td> <td data-bbox="553 575 675 779"></td> <td data-bbox="675 575 797 779"></td> <td data-bbox="797 575 919 779"></td> </tr> </tbody> </table>	Insured	Company Name	Cash Value	Beneficiary	Policy Nos.						Face Amount	Face Amount	Face Amount
Insured	Company Name	Cash Value	Beneficiary	Policy Nos.										
DEBTS AND OBLIGATIONS														

Notes/Comments:
