

BERNETICH, HATZELL & PASCU, LLC LAW OFFICES	2 KINGS HIGHWAY WEST, SUITE 101 HADDONFIELD, NEW JERSEY 08033 WEBSITE: WWW.ESTATEPLANLAWYER.COM <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">TELEPHONE (856) 795-3535</td> <td style="width: 50%;">FACSIMILE (856) 795-3322</td> </tr> </table>	TELEPHONE (856) 795-3535	FACSIMILE (856) 795-3322
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ESTATE PLANNING – INQUIRY SHEET			

Today's Date: _____

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

HOME ADDRESS: _____

OFFICE ADDRESS: _____

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 <small>(Please (i) list the value in appropriate columns to right; (ii) attach separate itemized lists as needed)</small>	APPROX. CURRENT MARKET VALUE
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	Insured	Company Name	Cash Value	Beneficiary	Policy Nos.	Face Amount
DEBTS & OBLIGATIONS						

Notes/Comments: _____
